EXOSTAR

SupplyLine

by Robot Morning

Internal User Documentation

- Navigating SupplyLine
  - Sidebar Menu and Status Toolbar
  - Supplier Dropdown Menu
  - Broadcast Messages
- Reviewing and Editing Supplier Details
  - Supplier Maintenance List
  - Viewing Supplier Details
- Parts
  - Working with the Part List
  - Part Reference Flag Filters
  - Part Relationship Filter
  - Understanding Part Relationships
  - Viewing a Part
  - Using the Part View
  - Viewing the Schedule
    - View the schedule row details
  - Sourcing Rules
  - Purchase Orders
  - Notes
  - Requiring ASN Approval
  - Blocking Supplier Edits
  - Edit VMI Stock Locations
- Tasks
  - Adding and Reviewing Tasks
  - Viewing Tasks
- Quality Release Authorization
- Creating ASNs (Legacy Dialog)
- Shipments
  - Viewing Shipments
  - Viewing Shipment Details
- Downloading the Schedule
- How Suppliers Update Plans
  - Manually Updating the Plan
    - Direct to Primary Customer
    - Indirect to Other Customers
    - Material consumer (Purchasing from Suppliers)
  - Using the Operational Data Template

    - Automating the Operational Data Template
    - Using DemandLine Client
- Purchase Order Change History
- Purchase Order Revisions
    - Acknowledge-By Reminder Emails
    - DPAS Ratings
- Unit Load Manager
- Critical Parts
- Tools
    - On-Dock Criticals
    - Aged In-Transit
    - LOB Report
    - Part Usage Report
    - Inventory Value Stream
    - ASN Approval
    - ASN Inquiry
    - BOM Discrepancy
- Metrics
    - On-Time Delivery
    - Supplier Delinquency
- Lifter
    - Viewing Issues in Lifter
    - Resolving an Issue in Lifter
- Search All Parts
- SupplyLine Extras
    - Finding Items on a Page
    - Exporting Data from Tables
- Help
    - Training Videos
    - Opening a Support Ticket
- Control Panel and Administrative Functions
    - Users
        - Linking Suppliers to Supplier Users
        - User Type Feature Matrix
    - Inventory Value Classes
    - Inventory Production Lines
    - Broadcast Messages

    - Remote Server Connections
    - Scheduled Tasks
    - Transaction History
    - AXON Settings
- Event Log
- Garbage Collection

NOTE: Some features described in this documentation may not be available in some systems

Navigating SupplyLine

Sidebar Menu and Status Toolbar

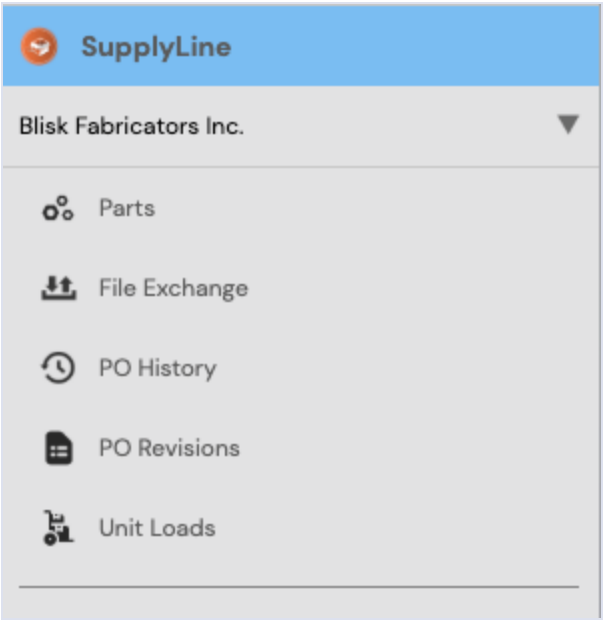
As a customer user in SupplyLine, you have the ability see and do everything that your suppliers can. You can also view several reports and analytics of the data in SupplyLine. When you log in as a Buyer user, you land on the screen below. The sidebar will contain your main navigation menu.



In the main application exists the sidebar menu. Depending on how SupplyLine is configured, the sidebar menu includes items such as **Parts**, **Search All Parts**, **Critical Parts**, **Shipments**, **View QRAs**, **PO Revisions** and **Tools**. The status toolbar always displays above the main application pane. It contains the following information:

- Your name
- The date and time the schedule was last updated in SupplyLine

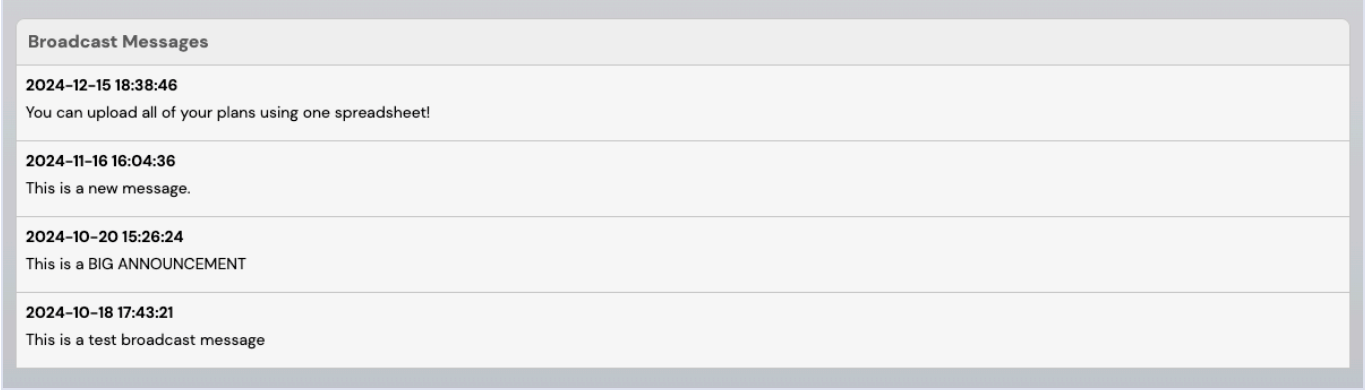
Supplier Dropdown Menu



- At the top of the sidebar menu for SupplyLine is a **Current Supplier** dropdown menu displays the name of the supplier currently in focus
- Upon selecting a supplier, the **Current Supplier** dropdown menu will display the name of the selected supplier
- Supplier-specific menu items will only be enabled in the sidebar menu once a supplier is selected

Broadcast Messages

Any messages currently being broadcast by SupplyLine admin users will appear on the landing page. Suppliers also see the messages that appear in this view.



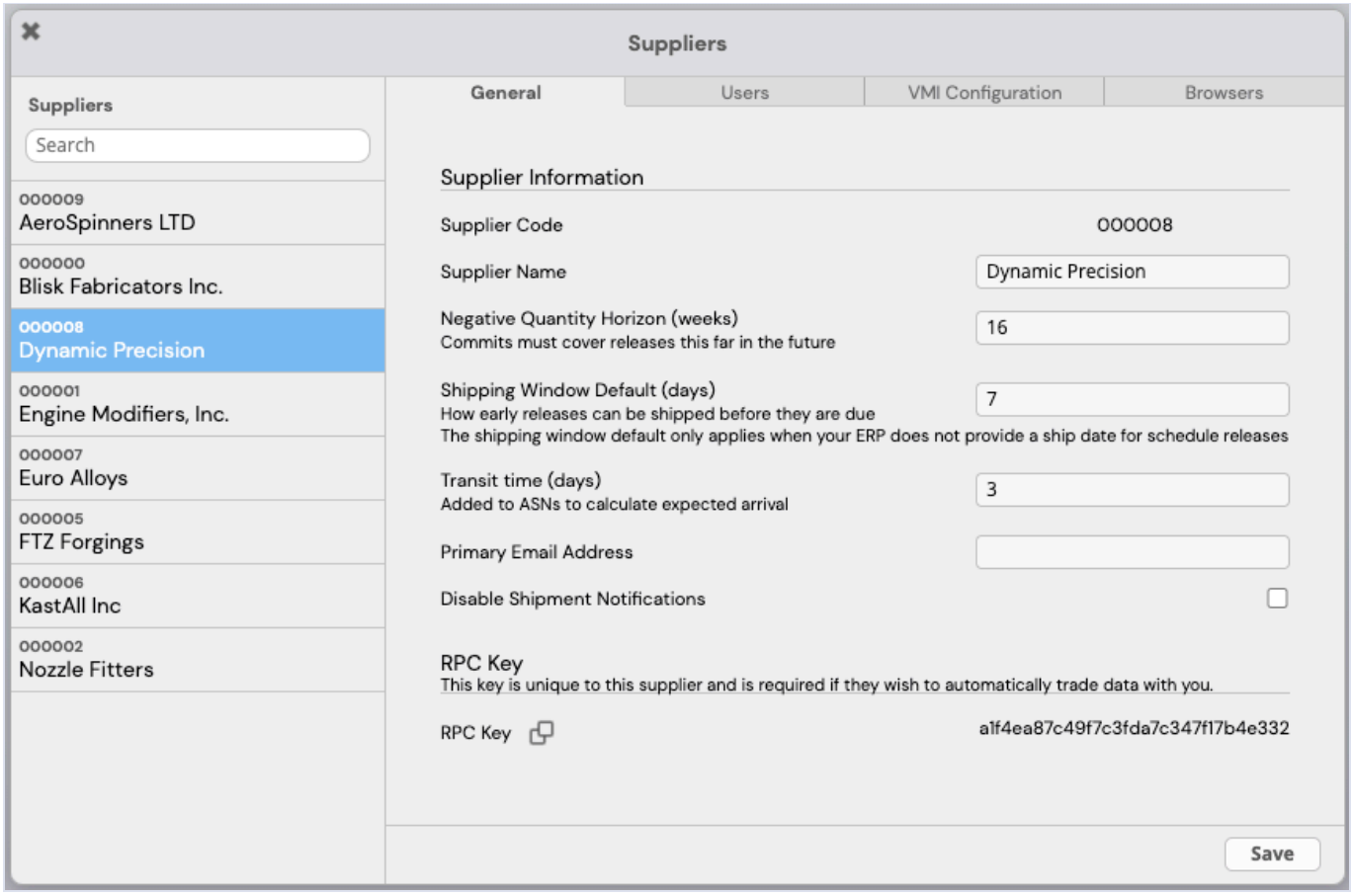
Reviewing and Editing Supplier Details

Supplier Maintenance List

Click **Supplier Maintenance** in the sidebar navigation to view a list of suppliers.

Viewing Supplier Details

Click **Supplier Maintenance** to open the Supplier Maintenance view. Use the **Search** bar at the top of the supplier list to search for suppliers by supplier code or supplier name.



Click a supplier's name to view or edit various details about the supplier. Use the tabs across the top of the view to access the following details:

- **General.** Displays the following general supplier information that you may modify (besides the **RPC Key**):
  - **Supplier code**
  - **Supplier Name**
  - **Negative Quantity Horizon (weeks)** Commits must cover releases this far in the future
  - **Shipping Window Default (days)** How early releases can be shipped before they are due. The shipping window default only applies when your ERP does not provide a ship date for schedule releases.
  - **Transit time (days)** Added to ASNs to calculate expected arrival
  - **Supplier's primary email address**
  - **Disable Shipment Notifications** Prevents the supplier from creating Shipment Notifications when checked
  - **RPC Key** – Each RPC key is unique to the supplier, and it is required if they wish to automatically trade data via AXON

- **Users.** Displays the list of Supplier users linked to the supplier, and the following information for each user:
  - **SSO Identifier** - Does not appear when using standard authentication
  - **Full Name**
  - **Email Address**
- **VMI Configuration.** Displays the following VMI configuration settings:
  - **Remote Server Connection**
  - **Processor Class Name**
- **Browsers.** Displays the methods used by the supplier's users to access SupplyLine, and the following information for each method:
  - **Browser**
  - **Operating System**
  - **First Seen**

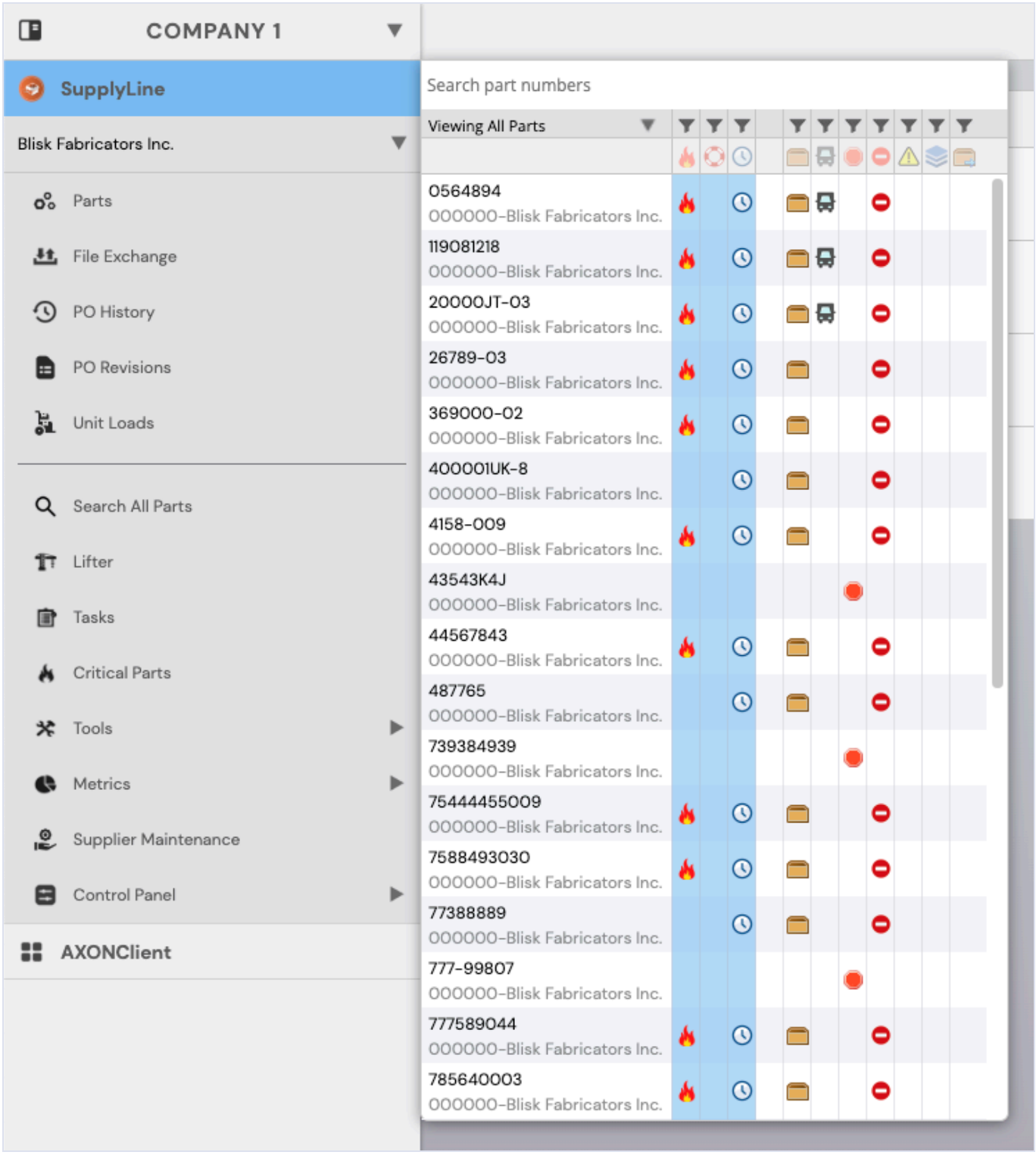
Superusers can use a system setting to disable the **Shipping Window** and **Transit Time** fields for Buyer users.

Parts

SupplyLine only displays parts that have open demand. For example, a part without an open purchase order will not appear in SupplyLine. Use the part list to navigate through supplier parts and their details.

Working with the Part List

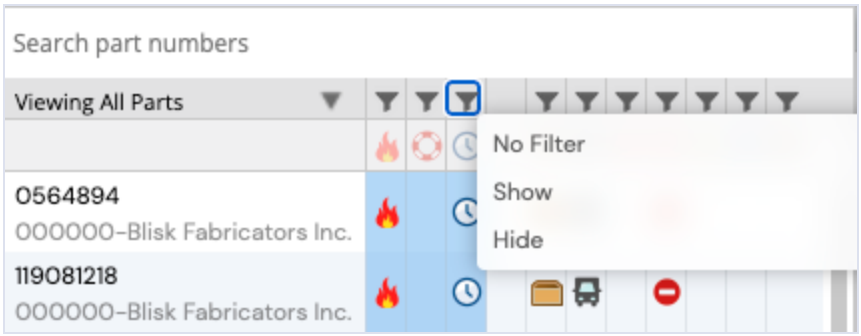
Select a single Supplier in the **Current Supplier** dropdown menu. Click on **Parts** in the sidebar menu to view the part list. All active parts and materials for the **Current Supplier** appear in the part list.



You have several options to navigate the part list:

- Scroll through the list
- Type the item number into the search bar
- Use the various filters
- Click on a part in the list to view its details

You can click the various filters across the top of the part list to show or hide parts with any given Part Reference flag. Multiple filters can be used at once. Once a filter is selected, an icon appears in place of the filter to indicate how the filter is set.



Part Reference Flag Filters

SupplyLine automatically flags items to show important statuses. The table below describes each of the Part Reference flags, along with how to resolve them if necessary.

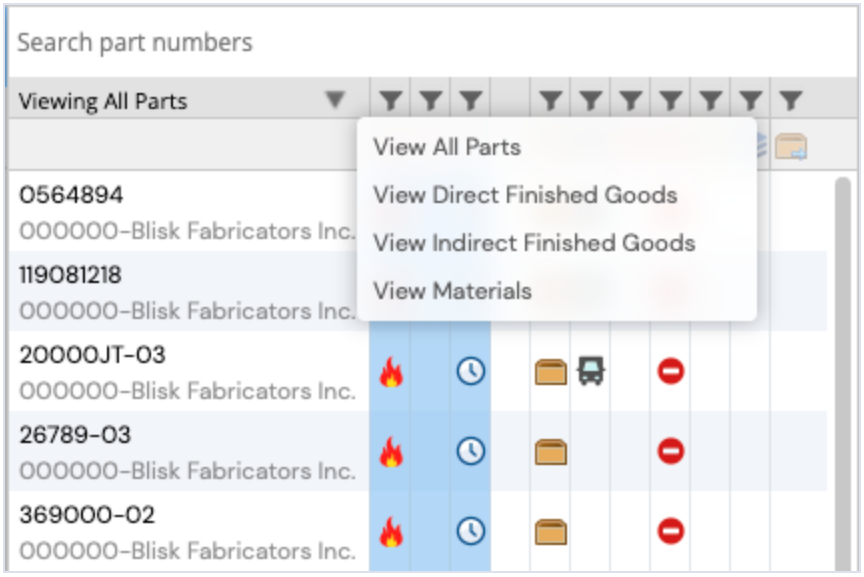
Icon	Name	Meaning	Resolution
	Critical	Item has past due release; production is delayed	Supplier: ship parts
	Rescue	Item does not have past due releases, but parts are needed now	Supplier: ship parts
	Delinquent	Item has past due releases	Supplier: ship parts
	Shippable	Item has shippable releases	
	In Transit	Item has ASN(s) in transit	
	Stop	Item has no firm releases (may have forecast/planned)	
	Missing Commits	Item has releases not covered by supplier plans	Supplier: update supplier plans
	Stale Commits	Item has supplier plans that are in the past	Supplier: update supplier plans
	Kit	Item has kit component	
	Transition	Item is in transition to supplier	

Part Relationship Filter

The Part Relationship filter allows you to narrow the parts down by the relationship they have to the customer. SupplyLine supports a few different types of supplier relationships. They are:

- Direct to Primary Customer
- Indirect to Other Customers
- Purchased Materials

Use the dropdown menu to choose a list of Direct Finished Goods, Indirect Finished Goods, or Materials.

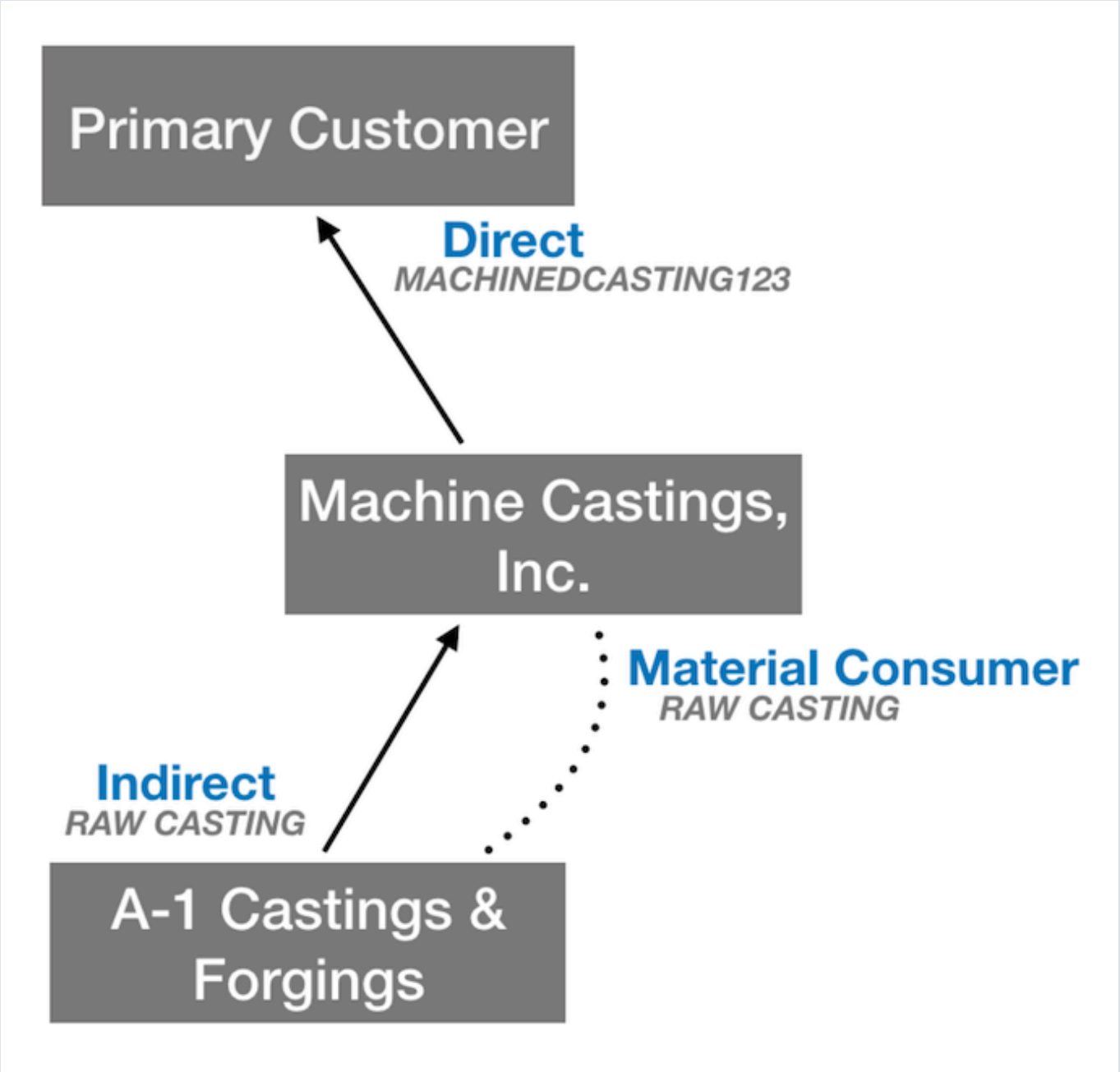


Understanding Part Relationships

In the example to the right, the supplier Machine Castings, Inc. is a Direct supplier to the Primary Customer because they ship finished goods directly to the Primary Customer.

A-1 Castings & Forgings is an Indirect supplier to the Primary Customer because they sell materials which have been pre-negotiated by the Primary Customer to Machine Castings, Inc.

Machine Castings, Inc. is a Material Consumer because they are buying those pre-negotiated materials from A-1 Castings & Forgings.



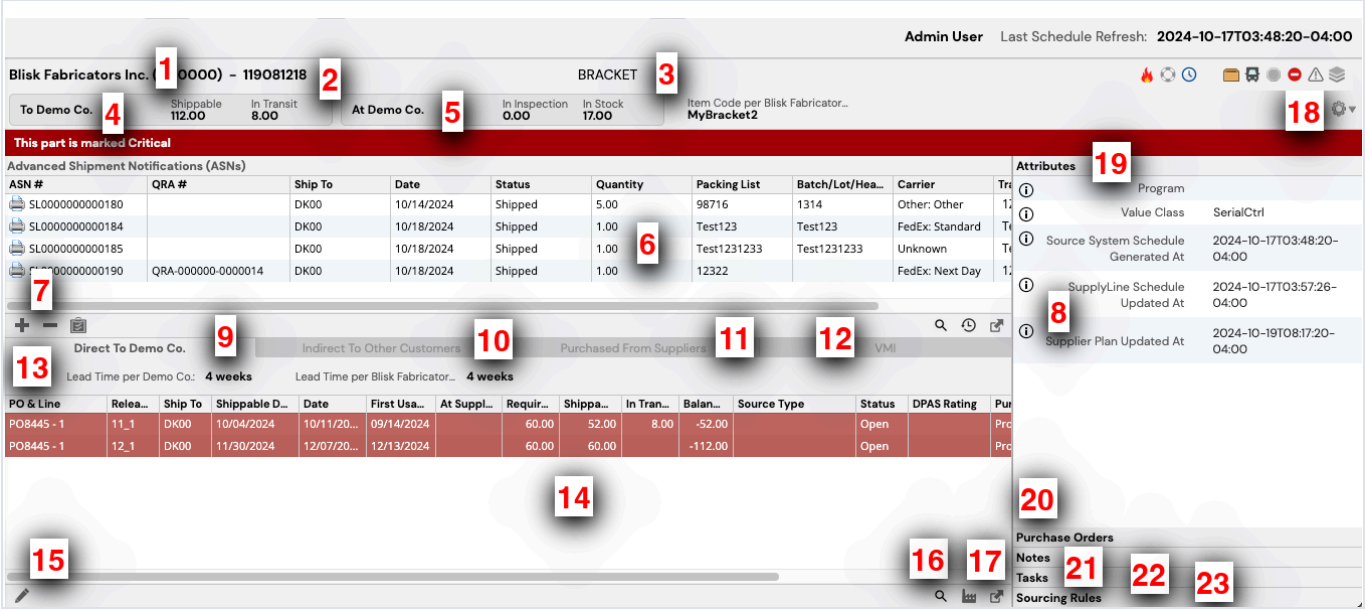
Viewing a Part

Select a single Supplier in the **Current Supplier** dropdown menu. Select **Parts** from the sidebar menu and scroll to the part you wish you view. You can also begin typing the item number into the search bar at the top of the **Parts** list. Click the part number, which will open the **Part view** screen.

Using the Part View

Access the **Part view** screen by selecting a supplier and then clicking **Parts** in the sidebar menu. Select a part from the Part list.

The **Part view** screen contains the most important information related to a single finished good or material. The information below shows a **Part view** screen and describes its different parts.



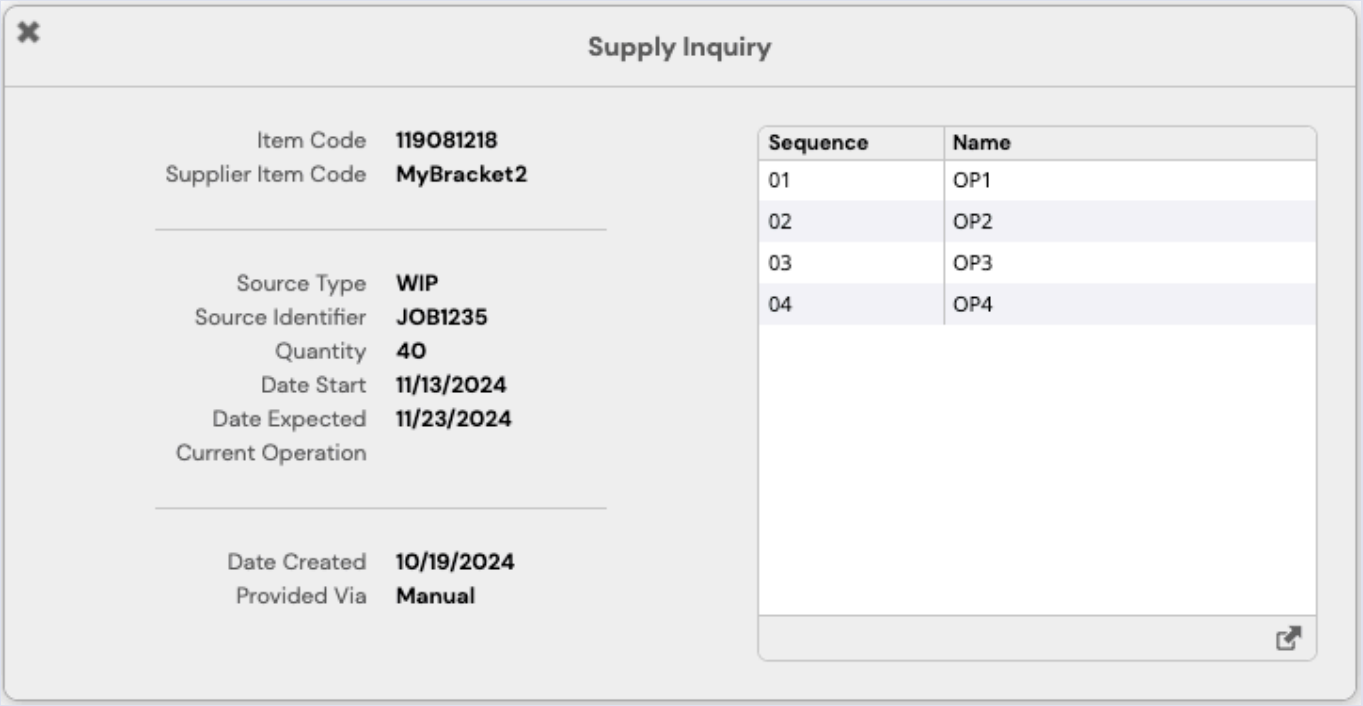
1. Supplier name and code
2. Item code
3. Item description
4. Quantities that are shippable and in transit to you from the supplier
5. Quantities that you currently have in inspection and in stock
6. List of all active ASNs
7. Buttons to add or delete ASNs
8. Button to display ASN history
9. Tab to display schedule for a **Direct to Customer** part (finished good)
10. Tab to display schedule for an **Indirect to Other Customers** part
11. Tab to display schedule for a**Purchased from Suppliers** part
12. Tab to display schedule for a **VMI** part
13. Lead Times (by calendar week) for both you and the supplier
14. Schedule for the item, with LOB
15. Pencil button can be used by the supplier to update plans (commits)
16. Button to display the **Manufacturing Demand** view
17. Export to Excel or CSV button, which appears in tables throughout SupplyLine
18. Gear menu used to block supplier edits, require ASN approval, and to edit VMI settings
19. Tab to display **Attributes** for the part
20. Tab to display **Purchase Orders** for the part
21. Tab to add, edit, or delete **Notes** on the part
22. Tab to add, edit, or delete **Tasks** on the part
23. Tab to display **Sourcing Rules** for the part

Viewing the Schedule

The schedule for each item is displayed in the bottom half of the Item view. If the background of the schedule is red, you are viewing a part with a negative balance.

View the schedule row details

Select a row in the schedule table and click **View record details** at the bottom of the table to see details of a purchase order release or supply.



Sourcing Rules

The **Sourcing Rules** section provides specifics about which suppliers are scheduled to provide the part, what percentage of the parts will be sourced from each supplier, and the timeframes during which each rule applies.

You can view the sourcing rules for the active part. Click **Sourcing Rules** on the right side of the **Part view**.

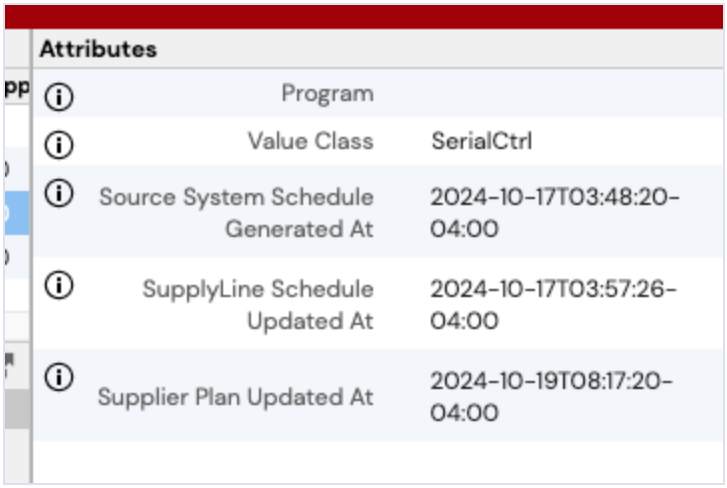
If a supplier is listed as 'Unknown/Other', this indicates that the part is likely being manufactured on-site rather than being purchased from a supplier.

Attributes

The **Attributes** section provides the following attributes about the part:

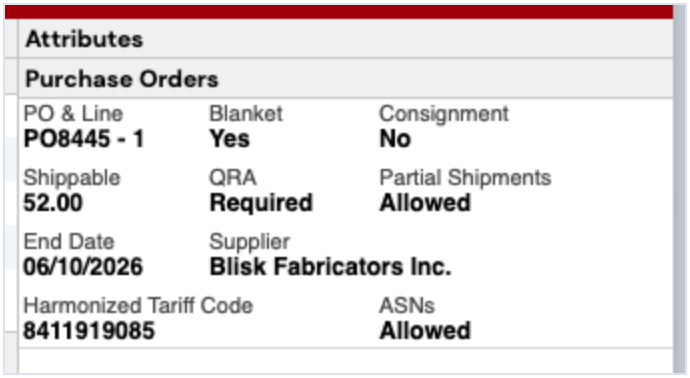
- **Program** - A program the part belongs to
- **Value Class** - The inventory value class of a part
- **Schedule Generated At** - The date and time the schedule was last generated in the source system
- **Schedule Updated At** - The date and time the part was last updated in SupplyLine
- **Last Supplier Plan Update** - The date and time the supplier last updated their plans

You can view the **Attributes** for the active part. Click **Attributes** on the right side of the **Part view**.



Purchase Orders

You can view information about the open purchase orders for the part you are viewing. Click **Purchase Orders** on the right side of the **Part view**. Each purchase order line shows its flags, including **Inspection Required** when the line requires inspection (see QRA Approval Workflow).



Notes

The Notes section shows notes that have been attached to the part. Both customers and suppliers have the ability to add, edit, and delete notes.

To add, edit, or delete a note on an item, start by accessing the Item view.

1. Click the Notes tab on the right side of the screen
2. Click ➕ **Add** at the bottom of this section to add a note to the part
3. Type the note in the message box, and if you wish to make the note visible to the supplier, check the box before clicking **Save**
4. Select a note, and click ➖ **Delete** or ✏️ **Edit** to delete or edit notes

Requiring ASN Approval

SupplyLine allows you to prevent a supplier from printing a new ASN for a part until you have reviewed and approved that ASN. This is most common in cases where you need to verify paperwork or quality requirements before the parts leave the supplier's facility.

If a part is configured to require ASN approval, an email is sent to buyers who have responsibility for that supplier every time the supplier creates an ASN for that part. They can then sign in to SupplyLine and approve or reject the ASN.

Blocking Supplier Edits

If you wish to prevent a supplier from changing their plans, you can turn on a block that will remain in place until the next time a schedule is sent to SupplyLine. To do so:

1. Open the item in the **Part view**
2. Click the **Gear** menu
3. Select **Block Supplier Edits**

When you select the **Block Supplier Edits** option, a red bar appears across the top of the **Part view** to notify users that the part can not be edited until the next schedule upload.

Edit VMI Stock Locations

If a supplier is configured to automate the VMI replenishment process, you must maintain configurations for the automated stock locations.

To edit VMI stock locations:

1. Go to the Item view
2. Click the Gear menu
3. Select Edit VMI Stock Locations

The **VMI Stock Locations** window provides details about how your stock locations map to supplier stock locations for parts that are subject to VMI automation.

You can select a VMI Automation method. The available methods are:

- **None.** (disabled)
- **By Stock Location.** One ASN will be maintained for each stock location defined in the table. A new ASN will be created for a location when its old ASN is received.
- **By PO/Blanket Release.** One or more ASNs will be maintained for each address defined in the table. A new ASN will be created when a PO or blanket release becomes shippable.

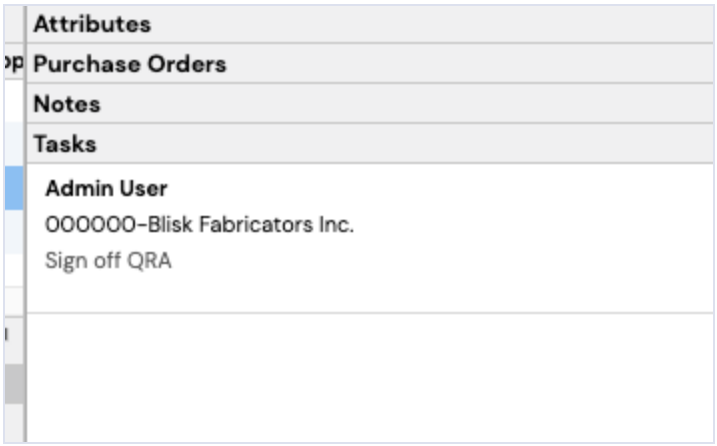
Tasks

Adding and Reviewing Tasks

Supplier and customer users can create part-specific tasks for the other party to complete. To add or remove a task for a supplier, access the **Part view**, then:

1. Click the Tasks tab on the right-side panel
2. Click ➕ **Add** to add a task for a supplier to complete
3. Select the task to request
4. Type an optional message

5. Click **Save** when you are finished
6. To delete a task, select the task and click ➖ **Delete**.

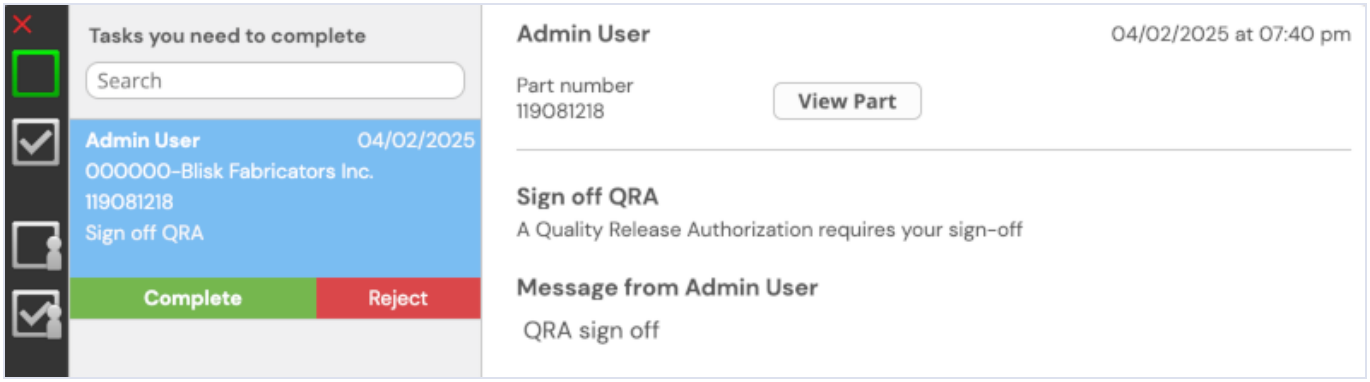


Viewing Tasks

If you have tasks that need attention, a red number will appear on **Tasks** in the sidebar menu indicating how many open tasks you have. To monitor and respond to tasks, start by clicking **Tasks** in the sidebar menu.

The Tasks window has a list of buttons on the left side.

- **Tasks that you need to complete.** When you click a task in this section, you are provided with details about task in the right pane. You also have the ability to complete or reject the task and to view the part's details by clicking **View Part**. When you click **Complete** or **Reject**, you have the opportunity to place a note on the task. Click **OK** to complete the process.
- **Tasks that you have already completed.** Clicking a completed task provides more details about the task in the right-side panel.
- **Tasks that you have requested which are incomplete.** If you click a task, you are provided with more details.
- **Completed tasks that you have requested.** Click a task to view more details about the completed task.



Quality Release Authorization

A Quality Release Authorization (QRA) is a document certifying that the parts and materials from your supplier comply with your quality requirements. QRAs may be created by designated Product Release Verification (PRV) personnel at your supplier or at your company.

Note: A QRA is only required if the purchasing order line is flagged by your source system as requiring a QRA.

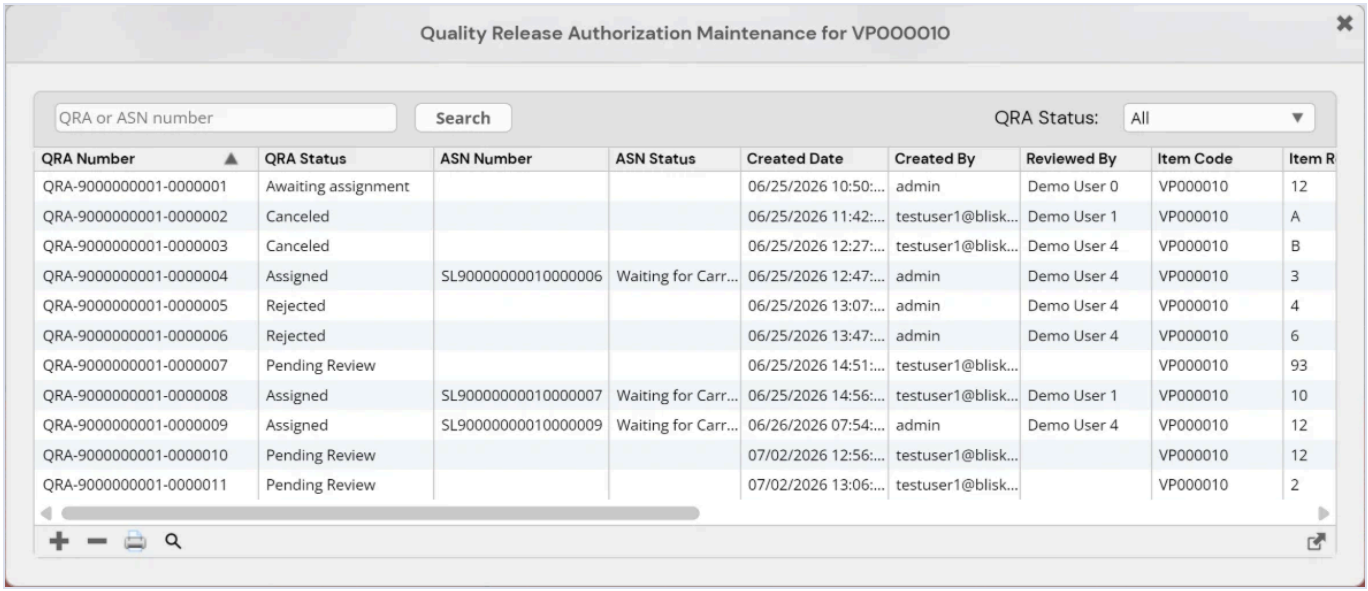
A QRA can go through up to three approval steps, depending on how SupplyLine is configured:

- **PRV personnel approval:** The PRV personnel who creates the QRA approves it on save.
- **Sub-tier supplier sign-off:** When the QRA requires sub-tier supplier sign-off, the sub-tier supplier's PRV personnel must sign off before the QRA can be used. See Signing-off on a Quality Release Authorization.
- **Quality Agent review:** When the QRA inspection workflow is enabled and the PO line requires inspection, your Quality Agent must review the QRA before it can be used. See QRA Approval Workflow.

Quality Release Authorizations can be in one of the following statuses:

- **Assigned:** The QRA has been assigned to an ASN.
- **Awaiting Assignment:** The QRA has been created and signed off by the PRV personnel. The QRA is awaiting assignment to an ASN.
- **Canceled:** The QRA has been canceled by the PRV personnel.
- **Awaiting Sign-off:** The QRA has been created by the supplier and is awaiting sign-off by the sub-tier supplier PRV personnel.
- **Pending Review:** The QRA was created against a PO line that requires inspection and is waiting for your Quality Agent to approve or reject it. It cannot be used on an ASN until it is reviewed.
- **Rejected:** The full quantity of the QRA was rejected during the review.

The **Quality Release Authorization Maintenance** window can be used to create, cancel, and reprint QRAs.



The **Quality Release Authorization Maintenance** window is accessible from the **Part view** screen. From the **Advanced Shipment Notifications (ASNs)** section (labeled **Shipments** when the Shipments feature is enabled), click **QRA Maintenance** to open the **Quality Release Authorization Maintenance** window.

The search field in the **Quality Release Authorization Maintenance** window allows you to filter the list of QRAs by QRA number or ASN number. The QRA Status dropdown filters the list of QRAs by status (All, Assigned, Awaiting assignment, Awaiting sign-off, Canceled, Pending Review, Rejected).

Creating a Quality Release Authorization

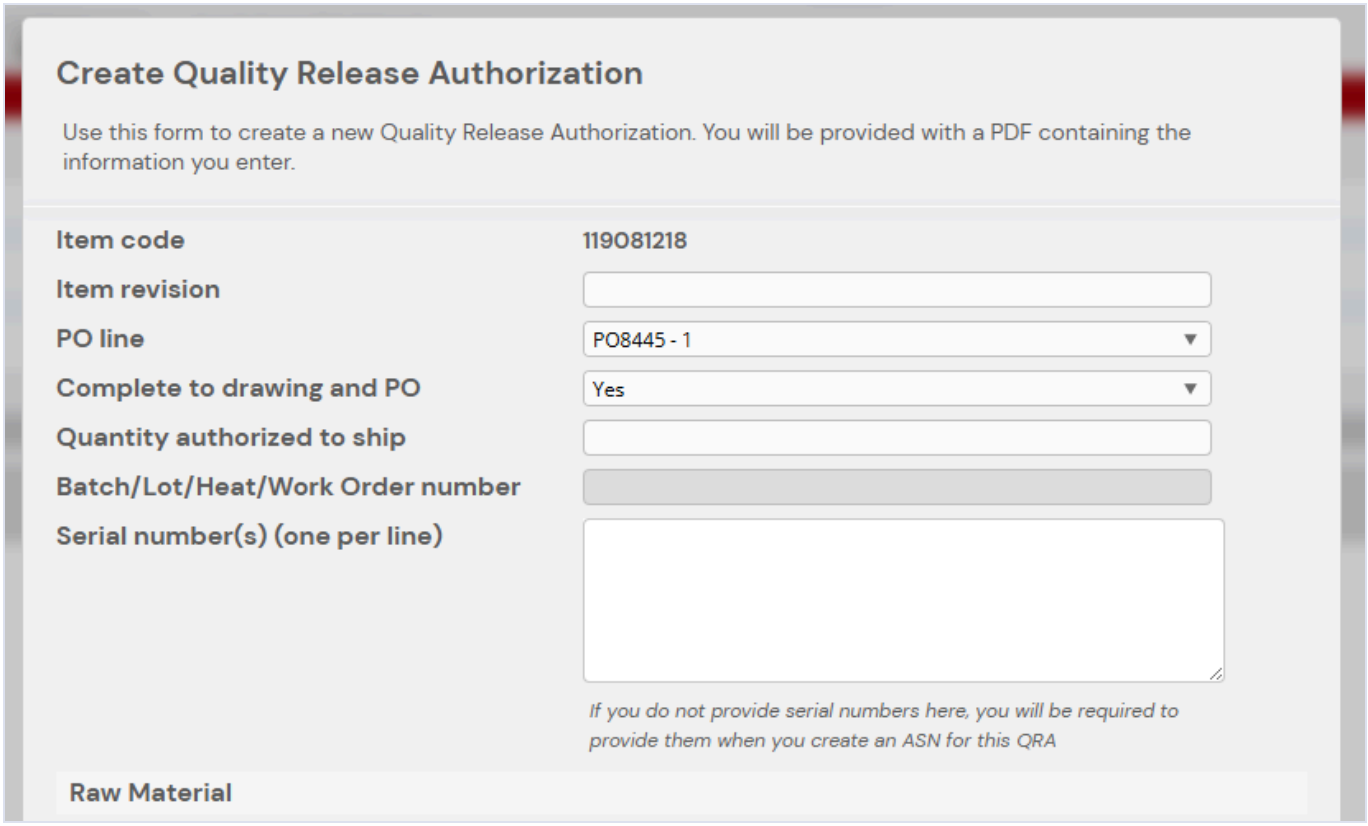
Only a PRV personnel can create a QRA if User Entitlements are enabled.

For more information on PRV personnel and user entitlements, refer to User Entitlements section.

Suppliers create a QRA by accessing the **Quality Release Authorization Maintenance** window from the **Part view** screen. The QRA is automatically approved by the supplier PRV personnel that created it (or, when sub-tier sign-off is required, once the sub-tier supplier signs off), unless the QRA inspection workflow is enabled and the PO line requires inspection. In that case the QRA is created in **Pending Review** status and must be reviewed by your Quality Agent before it can be used on an ASN. See QRA Approval Workflow.

From the **Advanced Shipment Notifications (ASNs)** section (labeled **Shipments** when the Shipments feature is enabled), the PRV personnel clicks **QRA Maintenance** to open the **Quality Release Authorization Maintenance** window. If this button is disabled, no purchasing order lines for this part require a QRA.

Once the **Quality Release Authorization Maintenance** window is open, the PRV personnel can click **Add** to open the view used to create a new QRA. Select the PO Line that the QRA applies to.

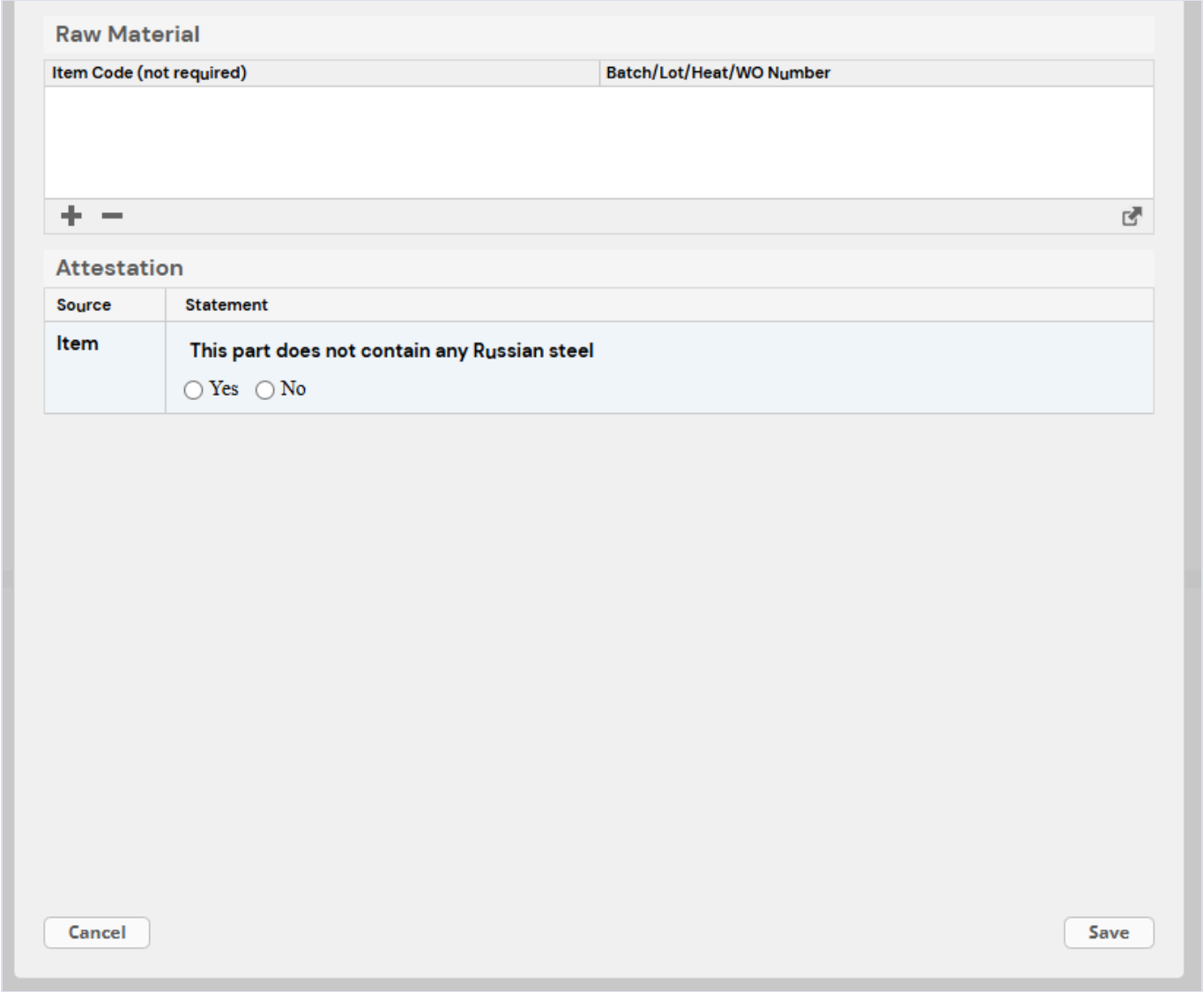


In the case where a sub-tier supplier is required to sign off on the QRA, do the following:

1. Check the **Requires sub-tier supplier sign-off** checkbox
2. Provide the sub-tier supplier code in the **Sub-tier supplier code** field

If the part requires raw material traceability identifiers, the PRV personnel must enter them in the **Raw Material** table. The raw material **Item Code** may be required for each identifier, depending on configuration.

If the part has attestable statements registered in SupplyLine, the PRV personnel must read and attest to the statements in the **Attestation** table.



After filling in the remaining data required for the QRA, the PRV personnel clicks **Save**.

Note: The quantity entered in **Quantity authorized to ship** must match the quantity that will be shipped on the ASN.

If SupplyLine is configured to register or validate traceability identifiers (serial numbers or lot numbers), a request will be made to the configured quality management system to register or validate them before the QRA is created.

QRA Approval Workflow

Note: *The QRA approval workflow may not be enabled in some systems*

When the QRA inspection workflow is enabled and the PO line is flagged **Inspection Required**, a new QRA is not approved on save. Instead:

1. The QRA is created in **Pending Review** status.
2. An email notifies the supplier's users that the QRA is waiting for review. A second email notifies the buyers assigned to the supplier (or superusers, when the supplier has no buyers) and the configured

inspection notification email address. When SupplyLine is configured to restrict inspection notifications to that address, only the address is notified.

3. Your Quality Agent reviews the QRA and records the **Quantity Approved**, the **Quantity Rejected** and any **Inspector Remarks**. The supplier's attachments and remarks are shown to the Quality Agent read-only.
4. The same recipients are emailed when the review is complete.

After the review, the QRA status is **Rejected** when the full quantity was rejected. Otherwise the QRA moves to **Awaiting assignment** and can be used on an ASN.

- A QRA in **Pending Review** status, or a fully rejected QRA, cannot be selected on an ASN.
- A partly rejected QRA can be used on an ASN for its remaining quantity (the quantity authorized minus the quantity rejected).
- A reviewed QRA cannot be edited. To ship the rejected quantity, the supplier creates a new QRA.
- While a QRA is in **Pending Review** status, the QRA PDF lists no approvals.
- QRAs created by mass upload are not held for review.

Canceling a Quality Release Authorization

Only a PRV personnel can cancel a QRA. To cancel a QRA, access the **Quality Release Authorization Maintenance** window from the **Part view** screen.

For more information on PRV personnel and user entitlements, refer to User Entitlements section.

Suppliers cancel a QRA by accessing the **Quality Release Authorization Maintenance** window from the **Part view** screen.

From the **Advanced Shipment Notifications (ASNs)** section (labeled **Shipments** when the Shipments feature is enabled), the PRV personnel click **QRA Maintenance** to open the **Quality Release Authorization Maintenance** window. If this button is disabled, no purchasing order lines for this part require a QRA.

Once the **Quality Release Authorization Maintenance** window is open, the PRV personnel can select the QRA that they would like to cancel and click **Delete**. A confirmation dialog will require them to confirm that they want to cancel the QRA. To cancel the QRA, they click **Yes**.

Reprinting a Quality Release Authorization

A QRA can be reprinted at any time, including when automatic QRA printing on save is turned off. Depending on whether digital QRAs are enabled, one of the following will happen:

- **Digital QRAs Disabled:** This will allow supplier users to reprint a QRA document. Suppliers should include the QRA document with the physical goods that they are shipping.
- **Digital QRAs Enabled:** This will not allow suppliers users to reprint a QRA document. Instead, supplier users can print a QRA traveler tag that they can use to identify the parts that they are shipping. Suppliers should not include the QRA traveler tag with the physical goods that they are shipping.

From the **Advanced Shipment Notifications (ASNs)** section (labeled **Shipments** when the Shipments feature is enabled), the PRV personnel clicks **QRA Maintenance** to open the **Quality Release Authorization Maintenance** window. If this button is disabled, no purchasing order lines for this part require a QRA.

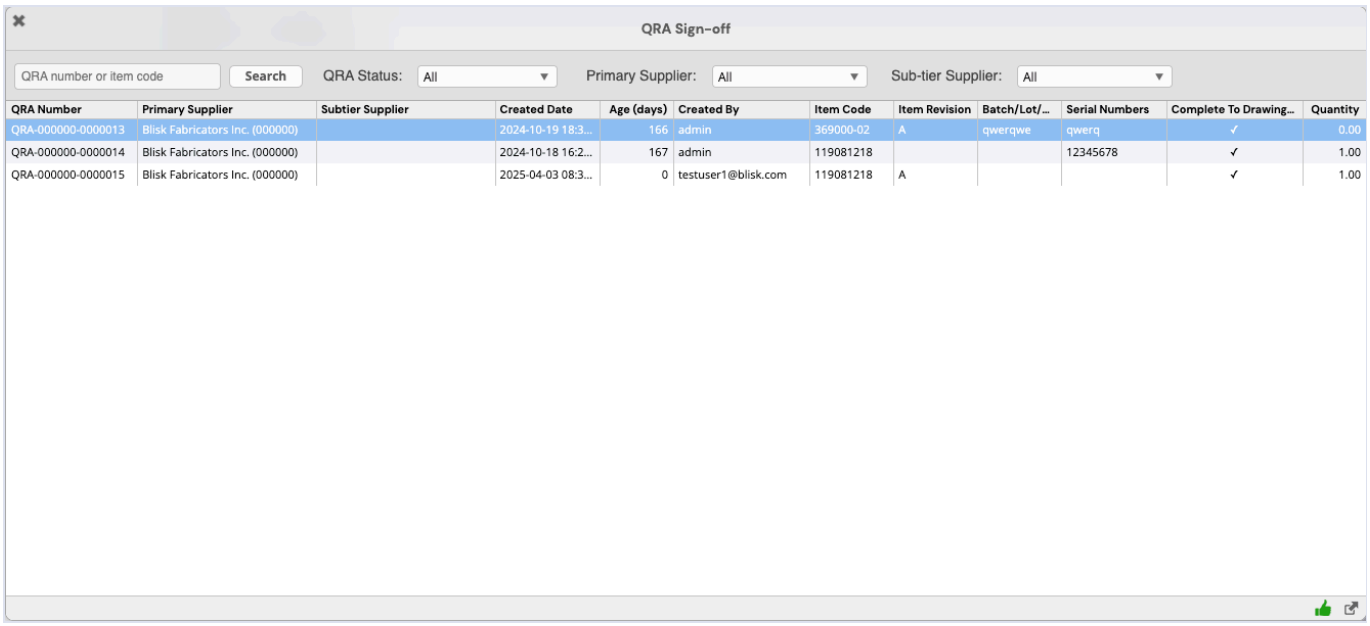
Once the **Quality Release Authorization Maintenance** window is open, the PRV personnel can select the QRA that they would like to reprint and click **Print QRA** to reprint the QRA.

Note: To reprint the Advanced Shipment Notification (ASN) label assigned to the QRA, the PRV personnel can click **Print ASN**.

Signing-off on a Quality Release Authorization

Only PRV personnel can sign off on a QRA. To sign off on a QRA, launch the **QRA Sign-off** window from the **Tools** menu in the sidebar by selecting **QRA Sign-off** in the menu.

- This view will only display sub-tier suppliers that are linked to the user.



The QRA Sign-off view contains a top bar that has some tools to assist ind filtering the table:

- The **search bar** will allow a user to search for a specific QRA by QRA number or item code.
- The **QRA status dropdown** will allow a user to filter the table by QRA approval status.
- The **primary supplier dropdown** will allow a user to filter the table by primary supplier.
- The **sub-tier supplier dropdown** will allow a user to filter the table by sub-tier supplier.

To sign-off on a QRA, do the following:

1. Select the QRA in the table.
2. Click the **thumbs up** icon in the bottom right hand corner of the table.
3. A confirmation dialog will require you to confirm that you want to sign-off on the QRA.
4. Verify the QRA Document Number that you are signing off matches in the confirmation dialog.
5. Read the legal statement prior to signing off in the confirmation dialog.
6. When ready click **Sign Off QRA** to finalize signing-off the QRA.

Creating ASNs (Legacy Dialog)

Note: As a SupplyLine internal user, you have the ability to create ASNs; however, we strongly recommend that you leave the responsibility with suppliers.

Note: ASNs can be blocked at the PO line level. If a PO line is blocked for ASNs, ASNs cannot be created for that PO line, even if the shippable date for any releases on that PO line has been reached. PO lines blocked for ASNs will be denoted in the PO tray.

Suppliers can create a new ASN by first accessing the **Part view**. From the **Advanced Shipment Notifications (ASNs)** section, they can click ➕ **Add** to create a new ASN. After filling in the data needed for the ASN creation, they can click **Create ASN**. When the Shipments feature is enabled, this section is labeled **Shipments**, lists shipments read-only, and does not offer **Add** — shipments are created from the **Shipments** screen instead. See Shipments.

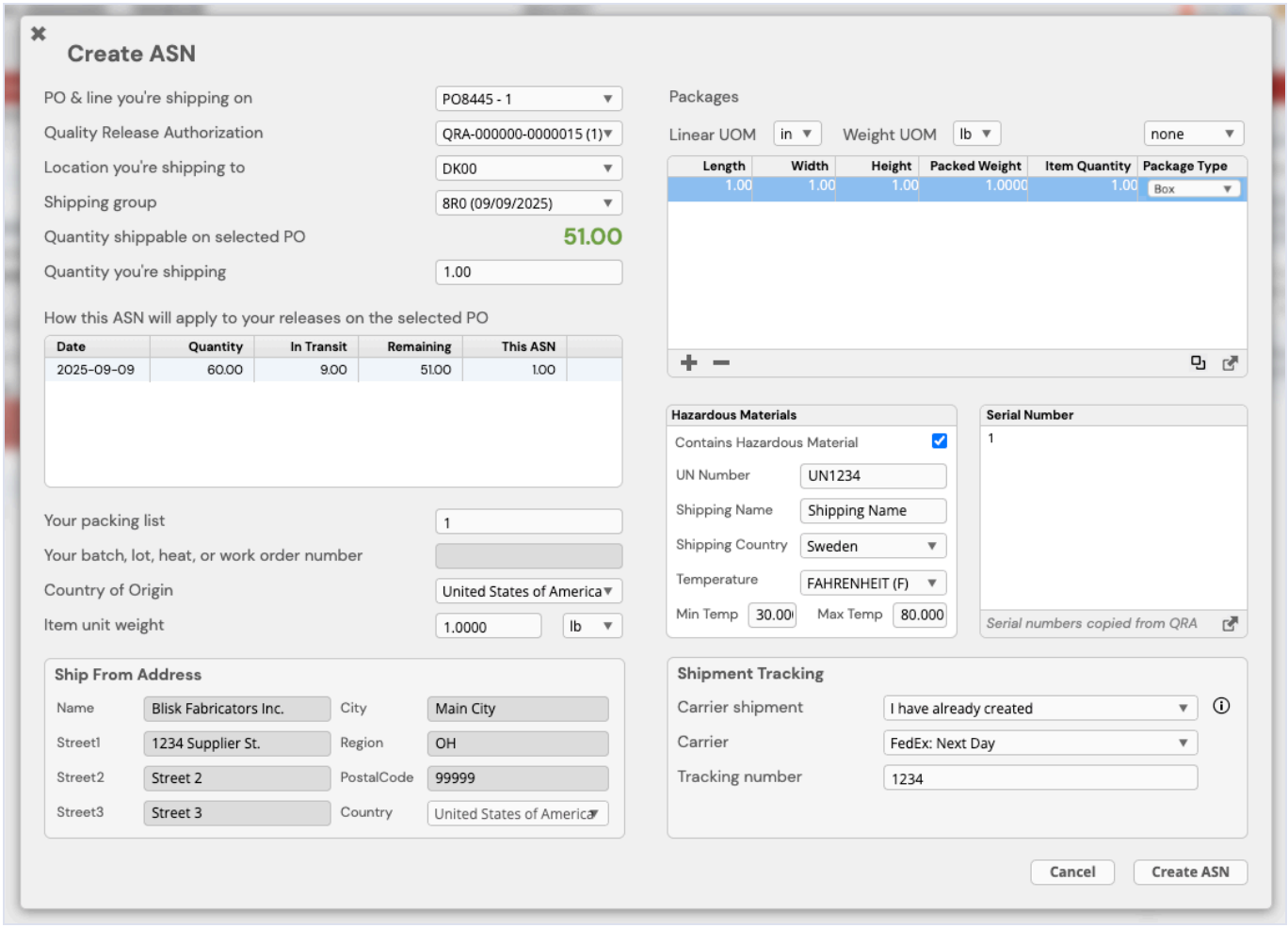
The **Quality Release Authorization** option requires your supplier to select a QRA if the selected PO line requires a QRA to be created. The list will only show approved QRAs that have not previously been used on an ASN. QRAs in **Pending Review** status and fully rejected QRAs are not listed. The quantity being shipped on the ASN must match the quantity authorized to ship on the QRA. If your supplier needs a QRA, direct them to talk to the designated PRV person for their company.

If the item is serial-controlled and the QRA has serial numbers already entered, the serial numbers are automatically populated in the **Serial number** table. If the item is serial-controlled and the QRA does not have serial numbers entered (or the QRA is not required), the **Serial number** table is available for the supplier to enter serial numbers. Entry is required only when the item's Value Class is configured to require serial numbers; otherwise it is optional.

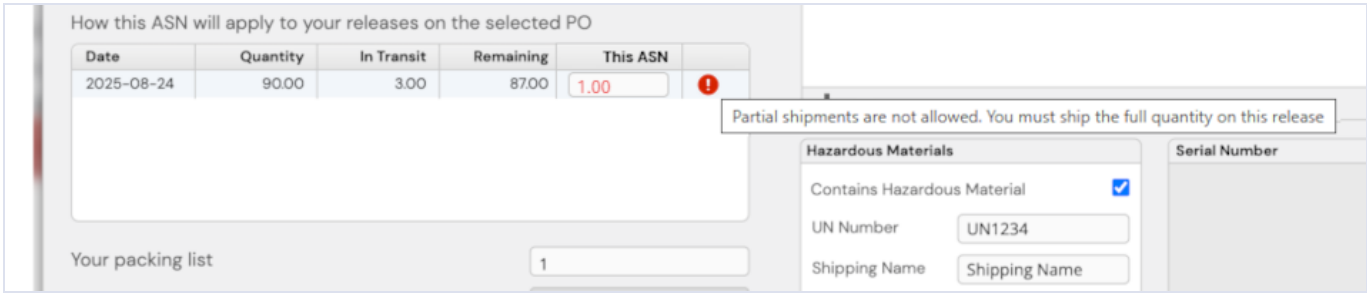
Depending on your system, shipping groups might be displayed for a supplier to choose from. The shipping group codes are 3-character alphanumeric strings (e.g. `AB1`, `Z8T`, etc.). A shipping group is defined by attributes on a release that govern how releases are grouped and shipped together. Administrators within your company decide which attributes on a release define the shipping groups. You can use shipping groups to prioritize releases you need the supplier to ship.

The **Item unit weight** is required to create an ASN because it is used to generate commercial invoices and create carrier shipments.

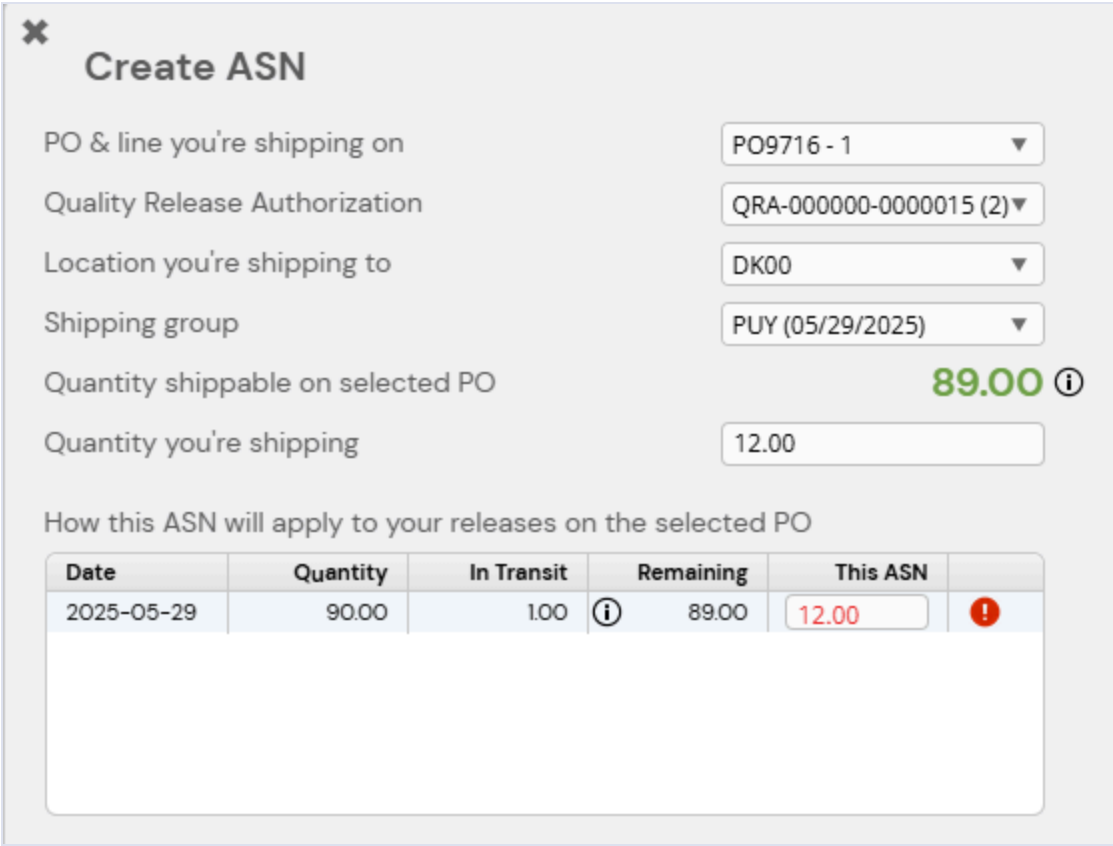
When creating an ASN, the supplier will need to assign the parts being shipped to one or more packages, on the right side of the **Create ASN** window. The total quantity assigned within these boxes needs to match the **Quantity you're shipping** on the left side, and each package needs to be given dimensions (length, width, height and weight). To duplicate a box, highlight the row to be copied and click ⧉ **Duplicate**.



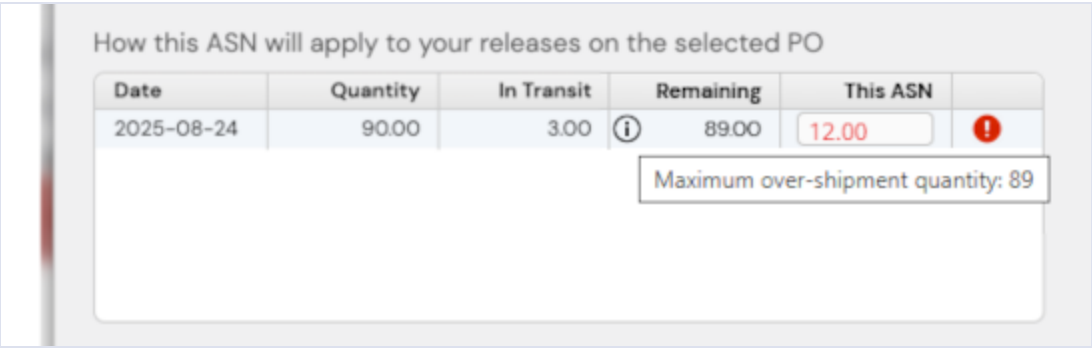
Some purchase order lines may not allow partial shipments. If the purchase order line does not allow partial shipments, an icon will appear when you enter a quantity that does not fulfill a purchase order release as shown in the following image:



Some purchase order lines may have releases that tolerate an overage. If the purchase order line has releases that tolerate overages, an information icon will appear next to the shippable quantity value and the ASN quantity values in the table become editable as shown in the following image:



The total allowed overage per release can be found by hovering over the information icon in the cell displaying the quantity remaining as shown in the following image:

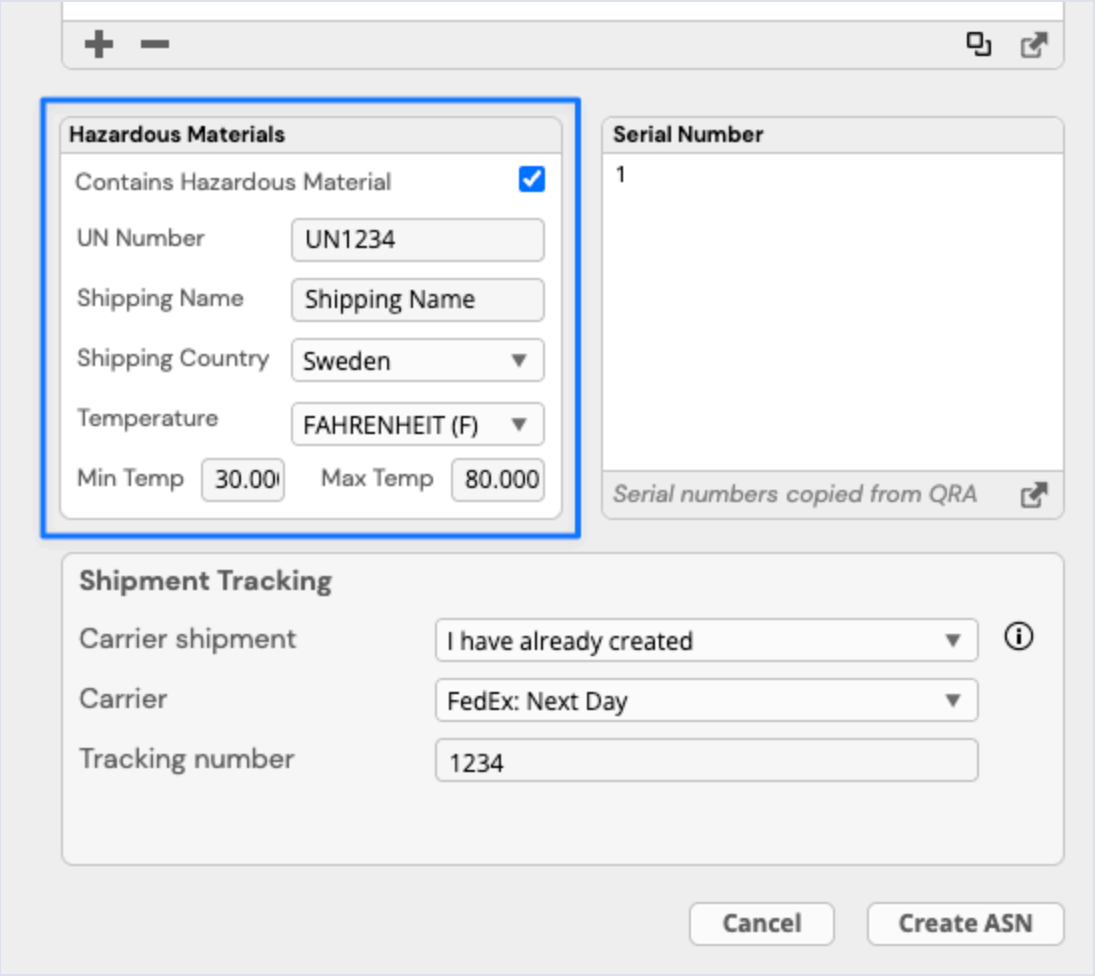


The serial number field is always available on the right side of the **Create ASN** window. If the Inventory Value Class assigned to a part is set to require serial numbers, a serial number must be entered for each unit of quantity on the ASN. If the Value Class does not require serial numbers, the field is available for optional entry. Submitting serials is allowed but not enforced. To configure serial number requirements on an Inventory Value Class, see Inventory Value Classes.

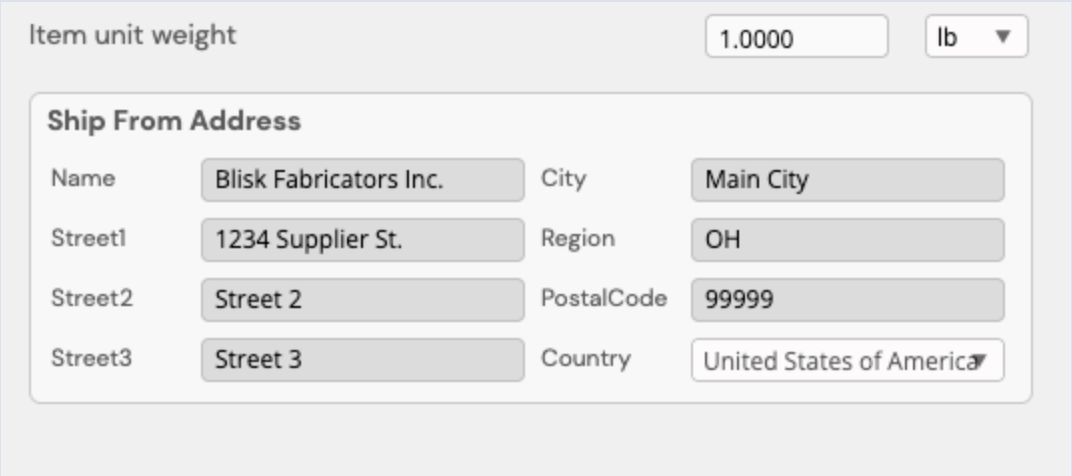
If the shipment contains hazardous materials, the supplier must check the **Contains hazardous materials** checkbox. Doing so will require them to enter the following additional information:

- **UN Number** – The United Nations number for the hazardous material
- **Proper Shipping Name** – The proper shipping name for the hazardous material
- **Proper Shipping Country** – The country code for the hazardous material
- **Temperature** – The unit of measure and temperature for the hazardous material

- **Min Temperature** - The minimum temperature for the hazardous material
- **Max Temperature** - The maximum temperature for the hazardous material

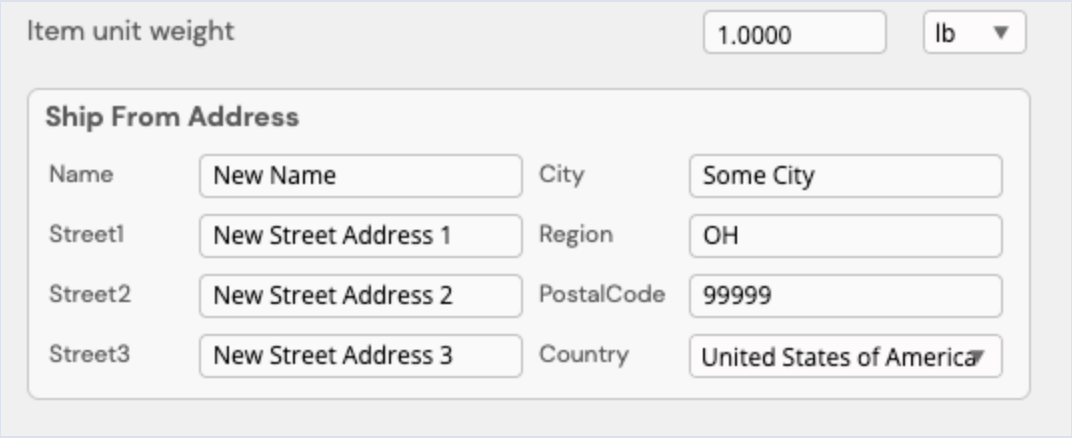


The Ship From Address section at the bottom left of the screen displays the supplier's address. This address is pulled from the supplier's details in SupplyLine. If the address is incorrect, please contact your SupplyLine administrator.



The Ship From Address fields are disabled unless your SupplyLine instance is configured to allow suppliers to edit their Ship From Address when creating an ASN. If your SupplyLine instance is configured

to allow suppliers to edit their Ship From Address, the fields will be enabled as shown in the following image:



Note that upon creating an ASN that the **From Address** will be validated against existing records and prompt the user to use existing addresses or create a new address record if no match is found.

The carrier shipment section at the bottom of the screen allows the supplier to select the way a carrier shipment is created. There can be up to three options for creating a carrier shipment depending on how your SupplyLine instance is configured.

Carrier Shipment:

- **Allow SupplyLine to create**: Creates an ASN and creates a carrier shipment for it. Carrier shipment labels will be generated if your SupplyLine instance has been configured to do so. The supplier is responsible for scheduling the pickup time with the carrier.
- **I have already created**: Creates an ASN and requires the supplier to enter the carrier shipment information. This is the default option if your SupplyLine instance is not configured to create carrier shipments.
- **Do not create yet; ASN will go on unit load**: Creates an ASN, which can later be assigned to a unit load and shipped via the Unit Load Manager.

When the shipment is supplier managed, a tracking number is required if Register Carrier Shipments is enabled; otherwise it is optional.

Note: If **Allow SupplyLine to create** is selected and carrier shipment creation is handled asynchronously (carrier details are not immediately returned), the ASN will show a status of “Waiting for Carrier Shipment” upon save. The status will be updated once the carrier shipment is created. SupplyLine will check for the carrier shipment every 30 minutes until it is created. Once created, an email will be sent to all users associated with the supplier on the ASN.

The ASN appears in the **Advanced Shipment Notifications (ASNs)** section of the **Part view** until it is received. Suppliers can print the ASN label by selecting and double-clicking the row. When the Shipments feature is enabled, this section is labeled **Shipments** and lists shipments; double-clicking a row opens that shipment instead of printing the ASN label. Once the ASN is received, the ASN is viewable in the **ASN History** screen for up to one year.

The ASN label is generated as a PDF document, which the supplier must print and include with the goods they ship to you.

A commercial invoice is generated when the ASN label is printed for international shipment. A shipment is defined as an international shipment when the country on the supplier's address is different than the country on the ship-to address or bill-to address.

If an international shipment's release has no customs value, SupplyLine blocks the ASN from being created or shipped, because a commercial invoice for an international shipment cannot declare a customs value of $0. A customs value must be entered before the shipment can proceed. A no-charge shipment is still allowed as long as a customs value is present.

If a release's customs value arrives late from the ERP — for example, a Unison schedule update that fills in a value that was previously $0 — SupplyLine automatically re-prices the not-yet-shipped ASNs allocated to that release so their commercial-invoice value reflects the corrected value. Already-shipped ASNs are left unchanged. Both the block and the re-price are recorded in the Event Log.

SupplyLine also blocks an ASN from being created or edited when a release's total quantity allocated across all of its ASNs would exceed the quantity ordered on that release plus any configured tolerance. The quantity already allocated counts every ASN on the release, including ones that have been received, so a release that has been fully shipped and received cannot be shipped against again. Reducing the quantity on an existing ASN is always allowed. Closed releases are never allocated to.

If SupplyLine is configured to register or validate traceability identifiers (serial numbers or lot numbers), a request will be made to the configured quality management system to register or validate them before the ASN is created.

Note: A Quality Release Authorization is released to be reused when SupplyLine cancels the assigned ASN due to an error. The Quality Release Authorization can be released when a user manually cancels an ASN.

Shipments

Note: *The Shipments feature is only available when Create Shipment is enabled*

A shipment is a group of parts or POs that ship together. When Create Shipment is enabled, suppliers create and manage shipments from the **Shipments** screen instead of the legacy **Create ASN** dialog. The supplier workflow (PO Line Release Search, the **Create Shipment** page, **Add Lines**, **Save Draft** and per-status actions) is described in the Supplier User Documentation.

Viewing Shipments

Select **Shipments** from the sidebar, choose a supplier, and click **Search**. By default the list shows shipments that are **Shipped** or **Waiting for Carrier Shipment**. As a customer user you can see shipments in the following statuses:

- **Waiting for Carrier Shipment:** SupplyLine is waiting for the carrier shipment to be created.
- **Shipped:** The shipment has shipped.
- **Received:** The shipment has been received.

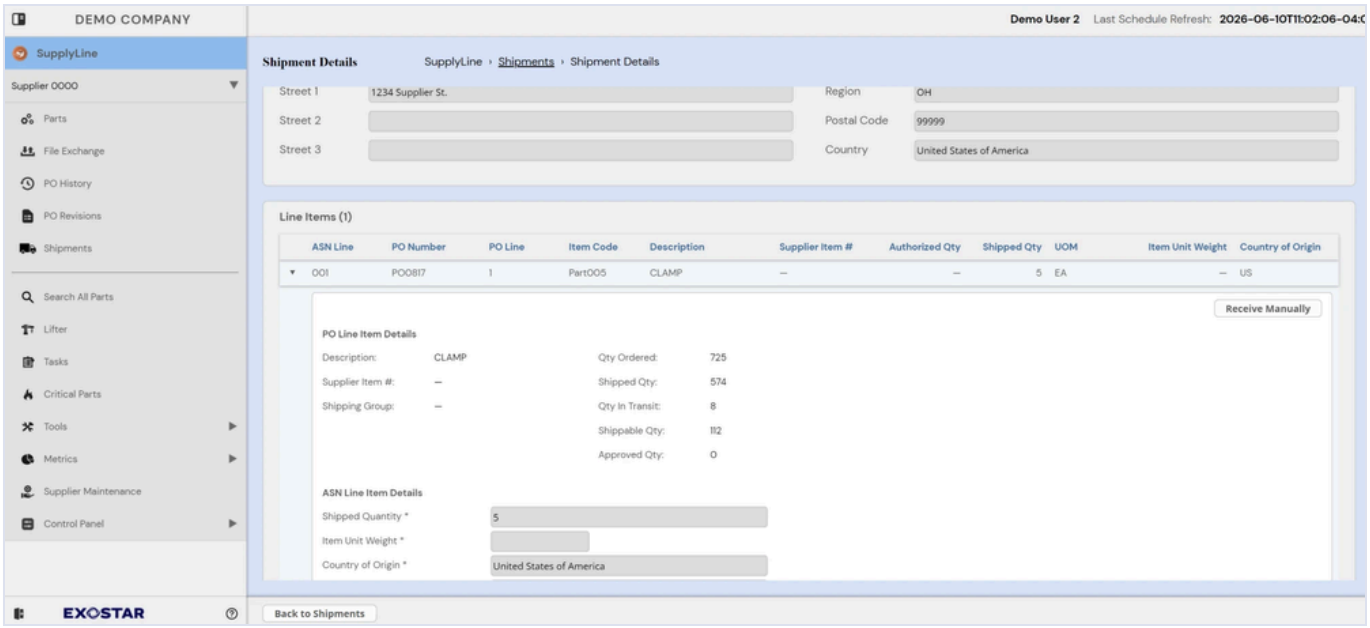
- **Partially Received:** Part of the shipment has been received.
- **Canceled:** The shipment has been canceled.

Shipments that suppliers have not finished (**Draft**, **Created** and **Shipping**) are not shown to customer users.

Viewing Shipment Details

Double-click a shipment to open the **Shipment Details** page. For customer users this page is read-only: supplier actions such as editing the tracking number, **Cancel Shipment** and **Print Shipping Label** are not shown. Each line's shipping group is shown in the **PO Line Item Details** pane, and is sent in the ASN export as `ShippingGroupCode`.

Each ASN with a **Shipped** status offers **Receive Manually**. See Receiving an ASN from Shipment Details.

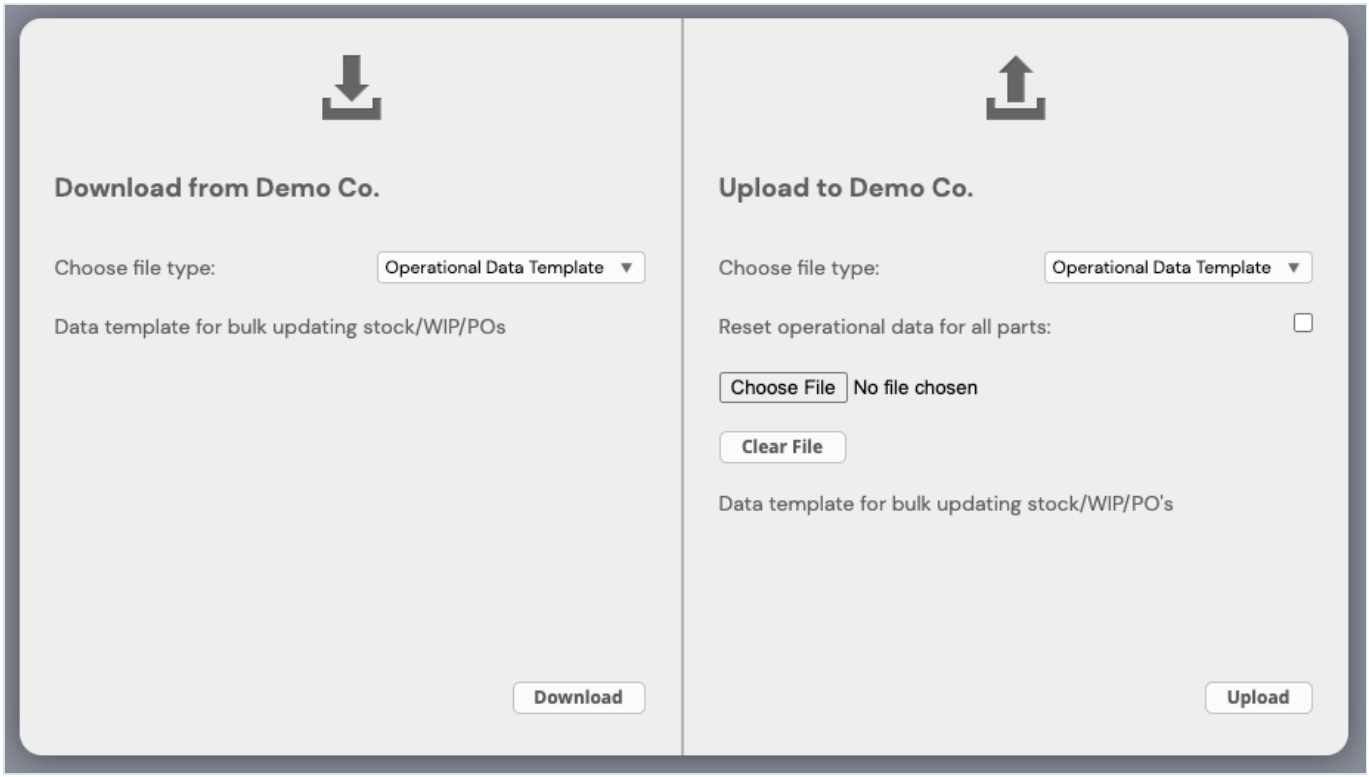


When a supplier cancels a shipment that is **Waiting for Carrier Shipment**, SupplyLine emails a cancellation notice to the configured TMS cancel notification address, if one is set.

Downloading the Schedule

You can download your supplier's entire part schedule to a CSV file by following these steps:

1. Select a single Supplier in the **Current Supplier** dropdown menu
2. Click **File Exchange** in the sidebar menu
3. From the left-side of the **File Exchange** view, change the drop-down menu so that **Schedule** is selected
4. Click **Download** to export the item schedule to a spreadsheet



How Suppliers Update Plans

Note: Plans should be maintained by the supplier. Buyers have access to the plans functionality, but you should not use it without good reason.

Suppliers can update their plans in SupplyLine in several ways. They are:

- **Manually in the user interface.** Suppliers click **Edit** at the bottom of the **Part view** for each part. This method is recommended if they have fewer than 10 parts to update.
- **Manually with a template.** Supplier can download, update, and upload the **Operational Data Template**
- **Partially automate with a template.** Automate the process of updating the **Operational Data Template** from the **File Exchange** screen and upload it manually.
- **Use DemandLine.** Suppliers can use Robot Morning's DemandLine software to fully automate the following processes with many customer systems:
    - Create ASNs and shipments
    - Update plans (commits)
    - Download and perform analytics on schedules from customers' portals
    - Update their ERP with new schedule information

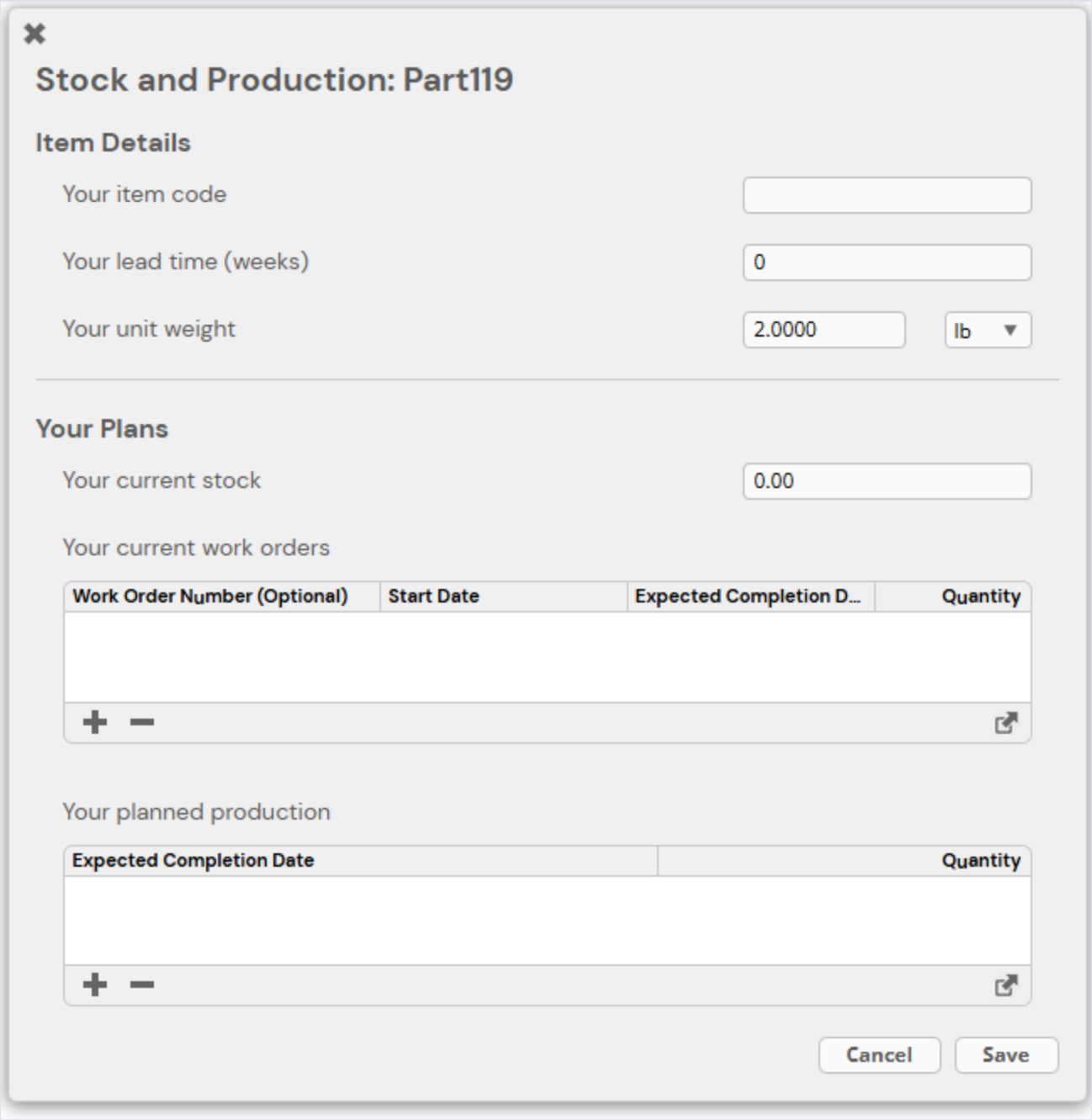
Manually Updating the Plan

To manually update the plan for an item, suppliers can access the **Part view** for a part by clicking **Edit** in the bottom left of the view. Doing so opens a window that allows the supplier to enter their plan.

There are three different views depending on which Part Relationship tab is being accessed:

Direct to Primary Customer

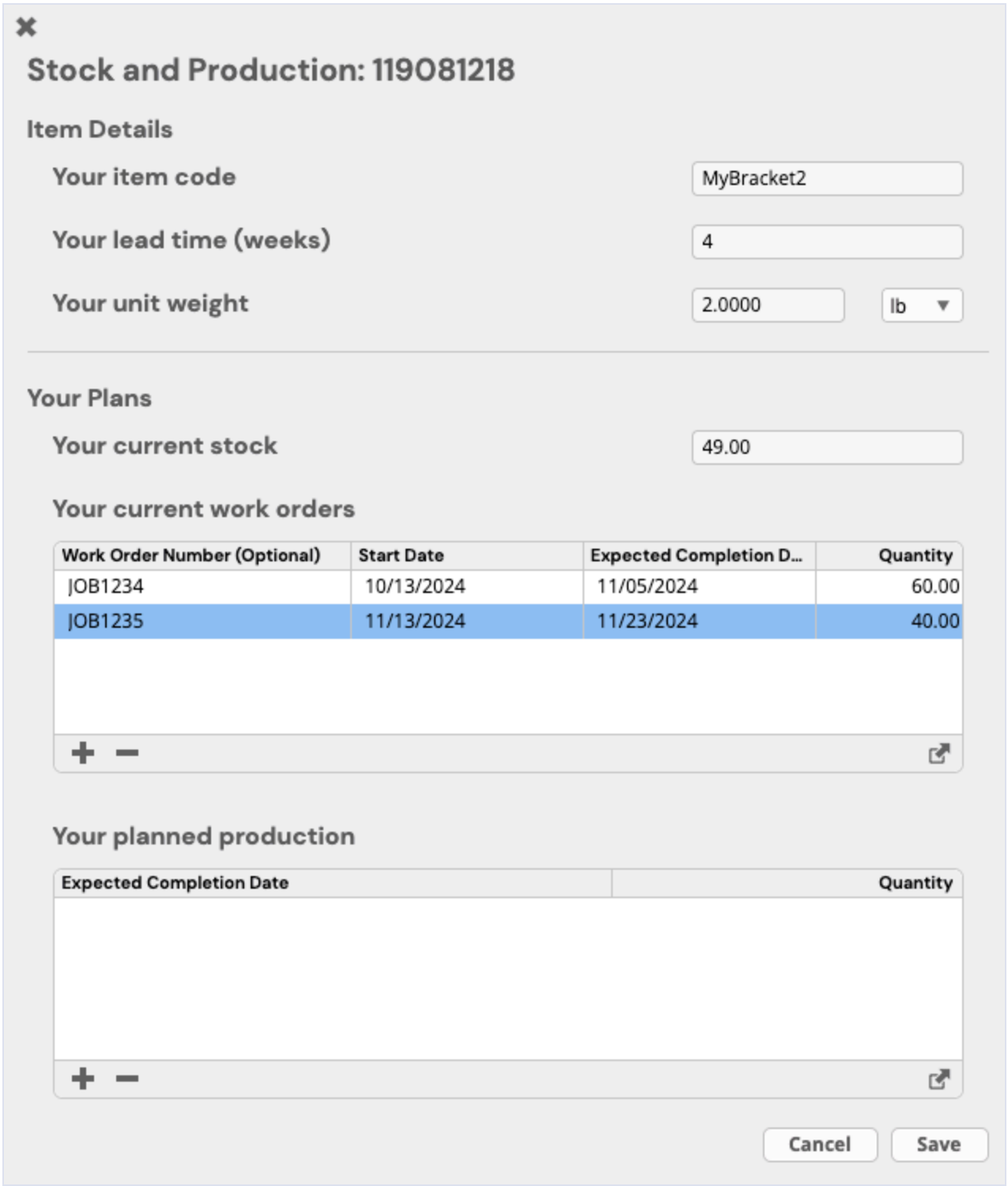
1. The supplier item code, if it is different
2. Supplier's lead time (in weeks or days, depending on your SupplyLine instance)
3. Unit weight and unit of measure
4. Current stock
5. Suppliers click ➕ **Add** or ➖ **Delete** to add or remove work orders or planned production



Indirect to Other Customers

1. The supplier item code, if it is different
2. Supplier's lead time (in weeks or days, depending on your SupplyLine instance)

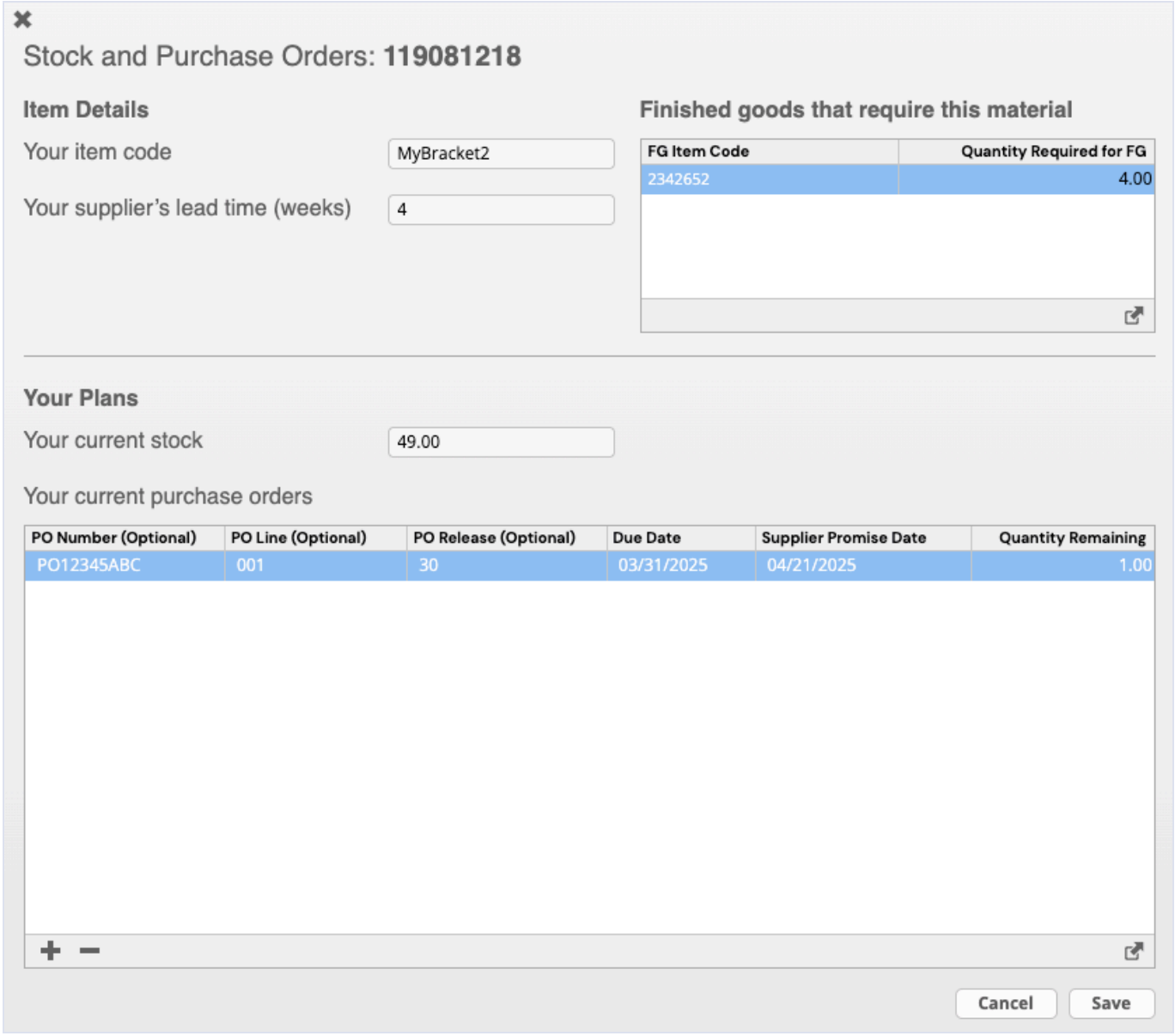
3. Unit weight and unit of measure
4. Current stock
5. Suppliers click ➕ **Add** or ➖ **Delete** to add or remove work orders or planned production



Material consumer (Purchasing from Suppliers)

1. The supplier item code, if it is different
2. Supplier's lead time (in weeks or days, depending on your SupplyLine instance)

3. Suppliers can change the quantity of this material that is required to make finished goods
4. Current stock
5. Suppliers click ➕ **Add** or ➖ **Delete** to add or remove purchase order information



Using the Operational Data Template

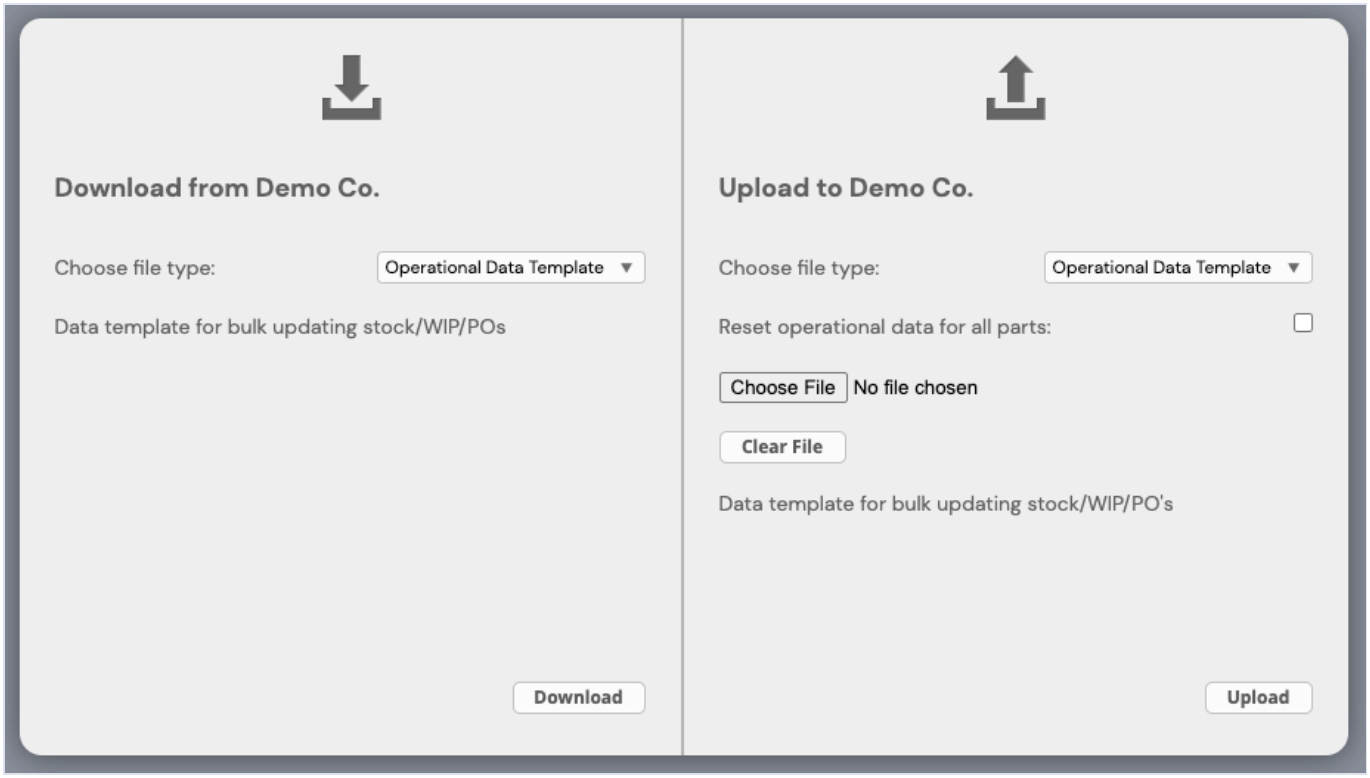
Note: The **Operational Data Template** should be maintained by the supplier. You have access to the **Operational Data Template** functionality, but you should not upload new files without good reason.

The **Operational Data Template** contains several sheets which, when downloaded, are populated with the supplier's parts and schedule information.

Each sheet can be matched to a report found within most ERP systems. Suppliers should review the information in the top of each sheet within the template to determine which report within their ERP will provide them with the data needed to update the sheet.

Suppliers can follow these steps to download the **Operational Data Template**:

1. Select a single Supplier in the **Current Supplier** dropdown menu
2. Click **File Exchange** in the sidebar menu
3. In the **Download from Customer** section of the screen, make sure the file type is set to **Operational Data Template**
4. Click **Download**



Suppliers can update the information in the freshly downloaded **Operational Data Template**.

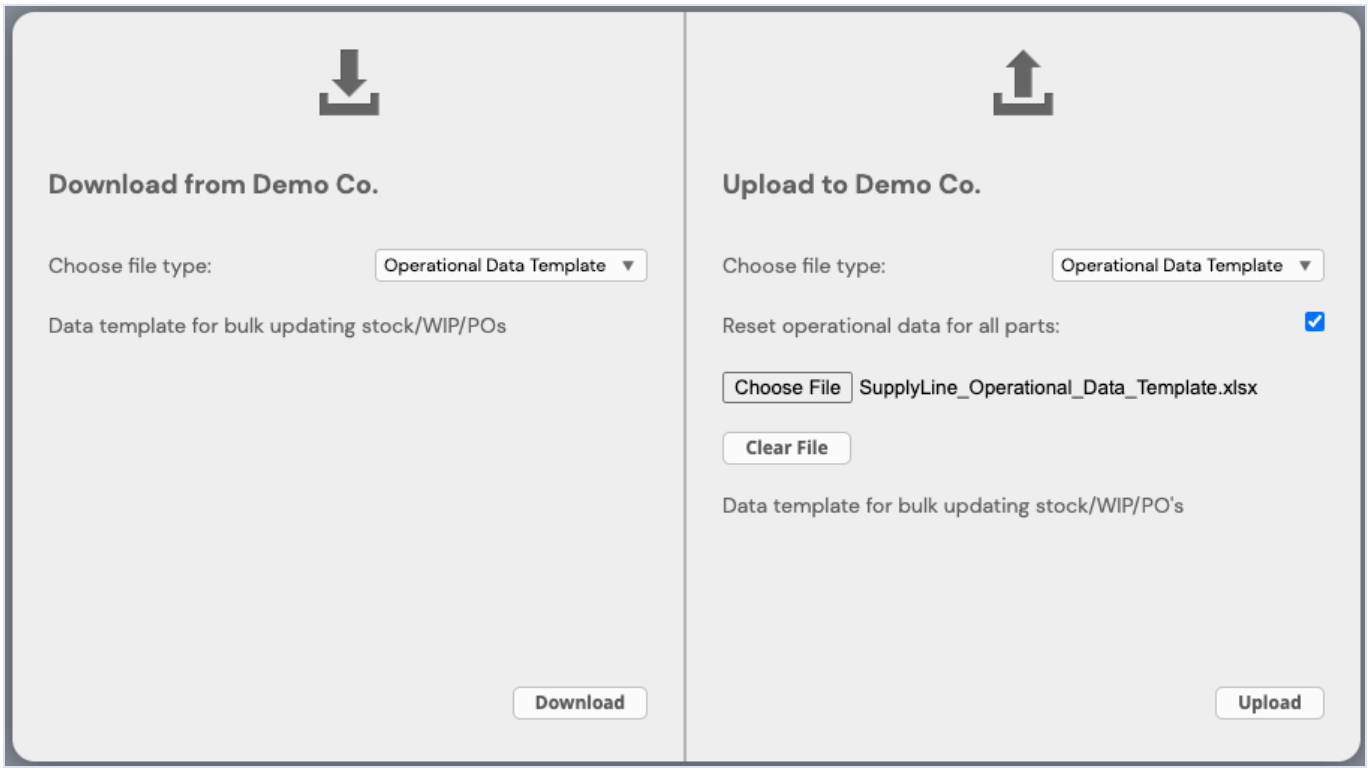
Before updating the spreadsheet and uploading Operational Data to SupplyLine, suppliers should keep the following in mind:

- Unless a cell is specifically marked as optional, it is a required field
- Users can use the template to reset plans for all parts, or to update plans for only some parts in SupplyLine
- If a supplier intends to completely reset plans for all parts, it is necessary to check **Reset operational data for all parts** when uploading new plans. This clears out plans for all parts and refreshes SupplyLine with the contents of the uploaded spreadsheet.
- If the supplier intends to update plans for only some parts while maintaining the existing plans in SupplyLine for all other parts, **Reset operational data for all parts** should be left unchecked.

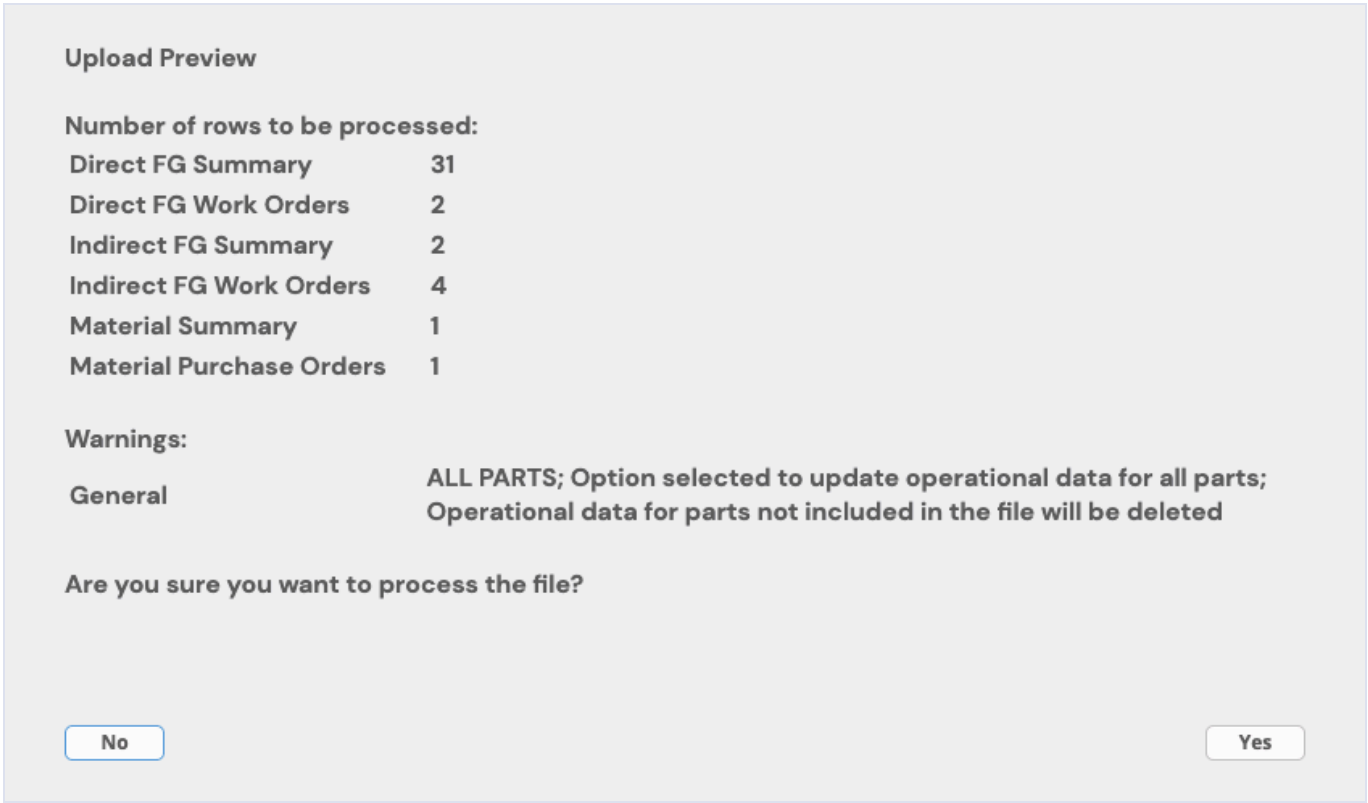
Once the **Operational Data Template** has been updated, suppliers can upload it to SupplyLine by following these steps:

1. Save the updated spreadsheet to the computer
2. Select a single Supplier in the **Current Supplier** dropdown menu
3. Click **File Exchange** in the sidebar menu
4. In the **Upload** section of the screen, if the user is resetting data for all parts, click the checkbox

5. Click **Browse** to select and attach the file
6. Click **Upload**



1. Review the confirmation screen
2. Click **Yes** to complete the upload



Automating the Operational Data Template

Suppliers who have the technical resources to do so may to automate the process of updating SupplyLine using the **Operational Data Template** found in the **File Exchange** screen.

Using DemandLine Client

If suppliers are interested in fully automating their use of SupplyLine, they should visit robotmorning.com/demandline for more information.

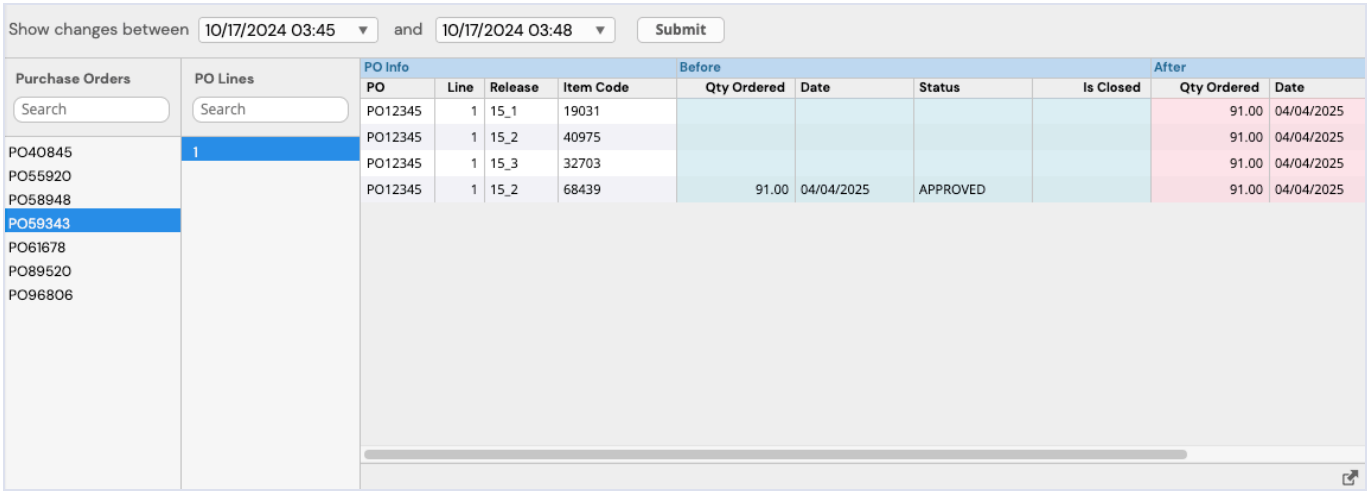
Purchase Order Change History

All users have the ability to view changes that have been made to PO releases. To view details about all changes to POs, make sure a supplier is in focus, and select **PO History** from the sidebar menu.

Suppliers can access the same view and can see the same information that you can see.

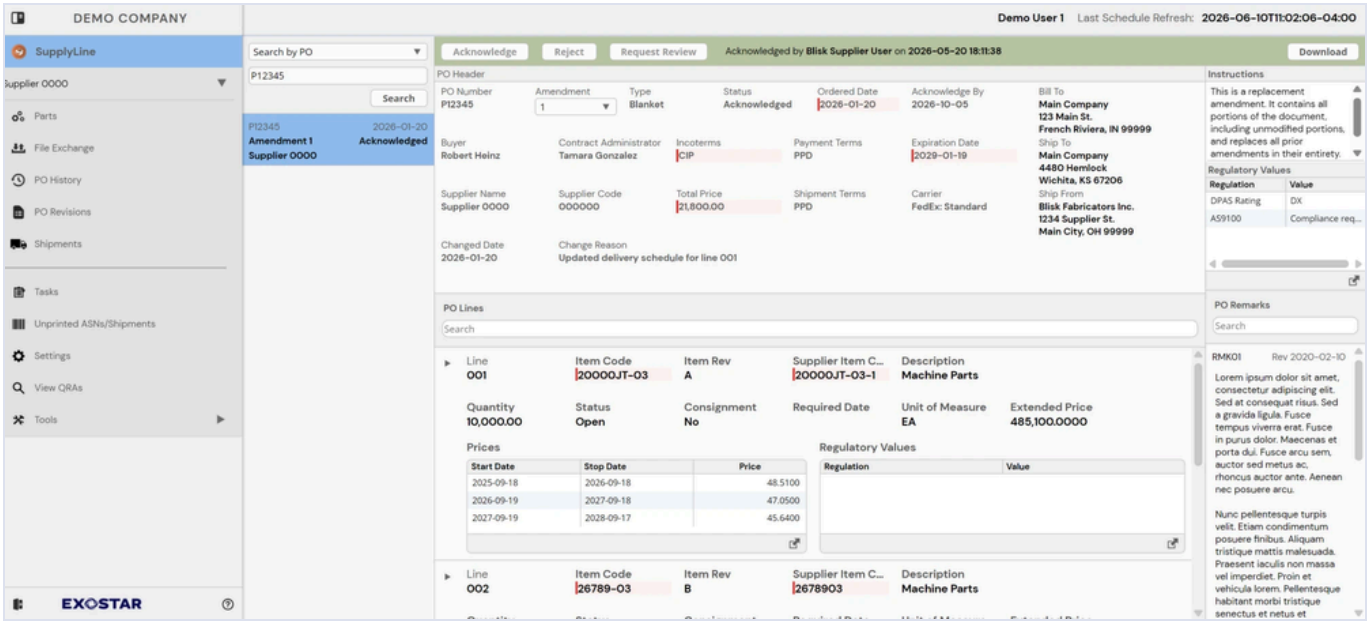
You can select a start and end date from the drop-downs provided, and click **Generate**. A list of POs that have changes will be displayed. Select a PO to see the lines from that PO that have changes. Select a line to see the schedule changes for that line.

Each change is listed, and you can review the Before and After sections of the History screen to determine what changed.



Purchase Order Revisions

All users can view Purchase Orders, along with previous revisions that have been made to those Purchase Orders. To view details about all Purchase Order Revisions, make sure a supplier is in focus, and select **PO Revisions** from the sidebar menu.



Use the panel on the left to search for or review all Purchase Order revisions that require action. A list of revisions is displayed in the left-side panel, and you can click each item in the list to review the full details in the main screen. You can use the **Amendment** dropdown to review previous amendments. Regulatory Values and PO Remarks are displayed in the right-side panel. In the center panel, all information about the Purchase Order and its Lines are displayed.

SupplyLine supports the following revision types:

- Replacement revisions: These revisions contain all portions of the document, including unmodified portions, and replace all prior amendments in their entirety.
- Differential revisions: These revisions contain only the modified portion of the document. Portions of the document (e.g. line items) that are not included in this amendment are not modified.

The revision details include the **Acknowledge By** date when your integration sends one, and the buyer's email address below the **Buyer** name. When the revision comes from a change order, a **Changed Date** and **Change Reason** are also shown; click the **Change Reason** to read the full reason. Once a supplier has acknowledged a revision, a banner at the top shows who acknowledged it and when ("Acknowledged by ... on ..."). The **Show amendments requiring action** filter narrows the list to revisions that still need action.

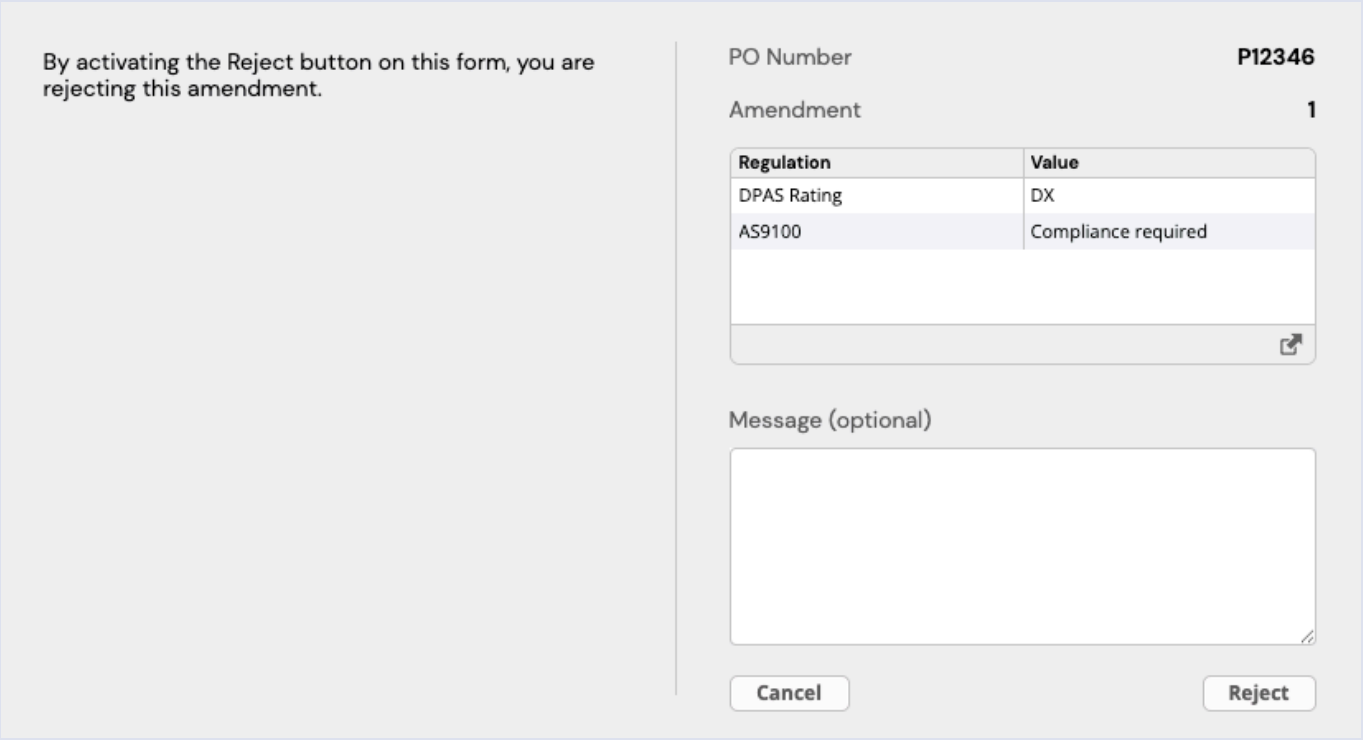
When PO revision change highlighting is enabled, fields that changed from the previous revision are highlighted, including changed header fields, line fields and Regulated Values rows. The first revision of a PO has nothing to compare against and shows no highlights.

Click **Download** in the top right to download a copy of the PO revision PDF document. SupplyLine will provide a PDF document generated by SupplyLine, if an existing contract document has not been provided by your integration.

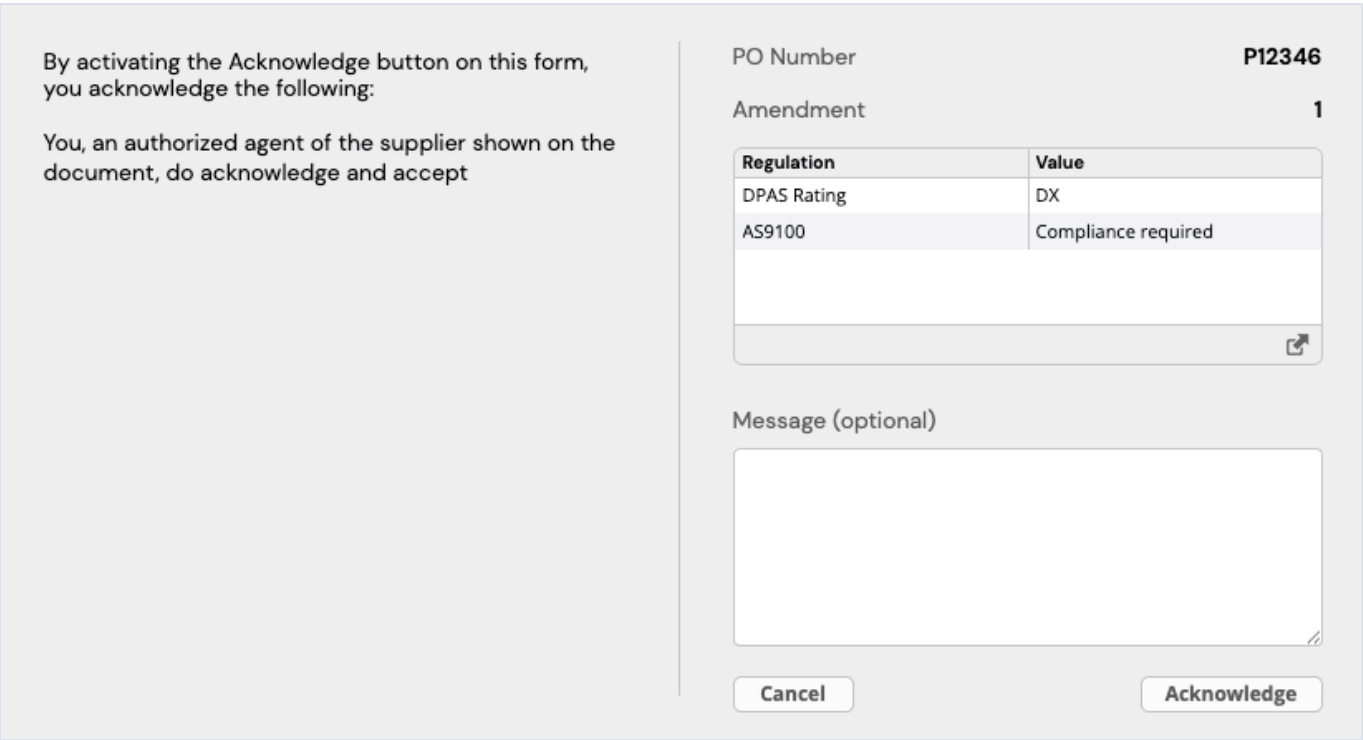
Customer users can **Reject** a revision; suppliers can **Acknowledge** or **Request Review**. This is why the buttons and the instruction text on this screen differ between customer and supplier users.

Click **Reject** in the yellow bar to reject a PO revision. A window will open to request that you confirm the rejection. You may provide a message to accompany the rejection. Superusers can use a system setting

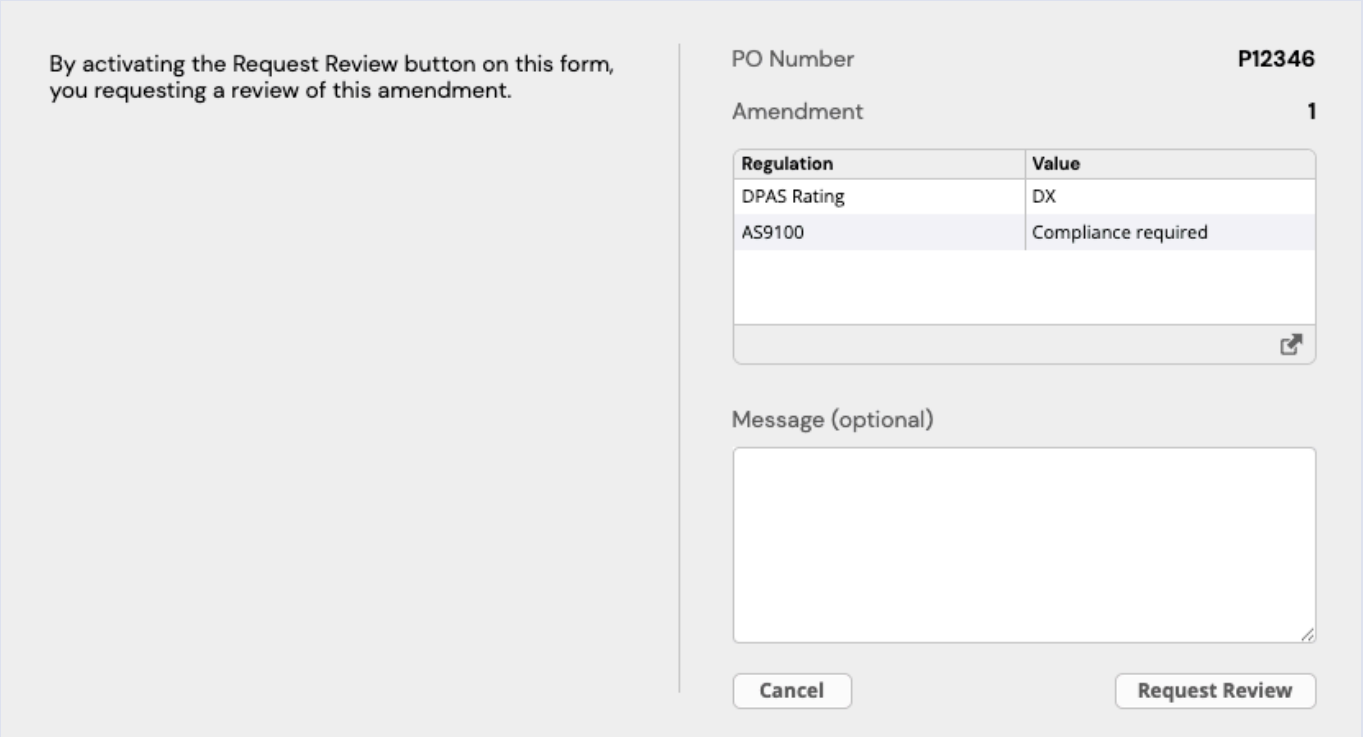
to configure whether rejecting a differential revision will automatically reject subsequent revisions.



Suppliers can click **Acknowledge** in the yellow bar to acknowledge a PO or revision. A window will open to request that the user confirm the acknowledgment. They may provide a message to accompany the acknowledgment.



Suppliers can click **Request Review** in the yellow bar to request a review from their buyer of a PO revision. A window will open to request that the user confirm their request for review. A message is required to submit the request.



Acknowledge-By Reminder Emails

SupplyLine emails acknowledge-by reminders to suppliers for revisions that your integration sends with an **Acknowledge By** date and flagged as DO/DX-eligible. Revisions without both values are never reminded.

- One reminder 5 working days before the **Acknowledge By** date
- Once the date has passed, one reminder each weekday

Reminders are sent by the **Send acknowledgement reminders** scheduled task, weekdays at 08:00 in your company's time zone, as one digest per supplier sent to all of that supplier's users. They stop when the revision is acknowledged, rejected, put under review, or replaced by a newer revision.

DPAS Ratings

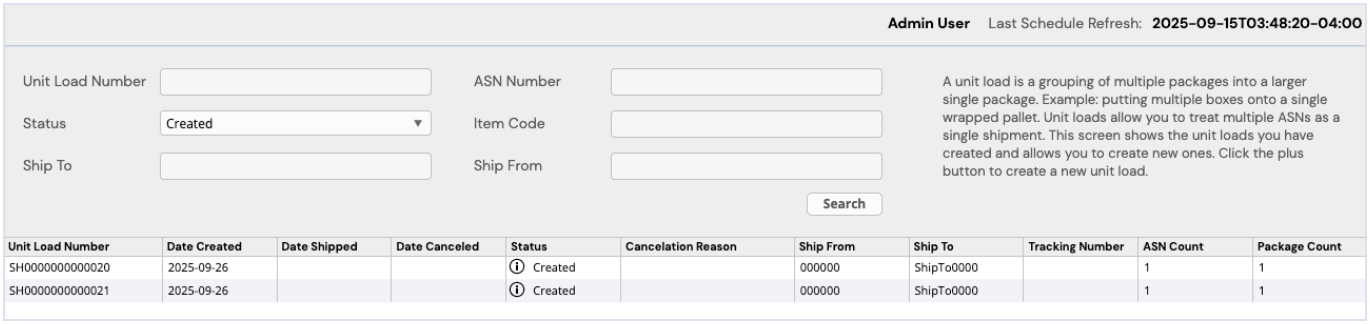
DPAS is the US Defense Priorities and Allocations System. A DPAS rating (**DO** or **DX**) marks an order as a priority defense order; DX orders have the highest priority. The **DPAS Rating** column is shown on the **PO Line Release Search** screen, in the **Part view** releases table and in **Purchasing Release Inquiry**. On the **PO Line Release Search** screen, DX ratings are shown in bold.

Unit Load Manager

The **Unit Load Manager** allows a supplier to manage their unit load shipments. A unit load shipment is made up of one or more Shipment Notifications and represents the physical shipment as a collection of packages. The carrier information can be generated from the unit load shipment and any labels provided by the carrier are printable.

The **Unit Load Manager** can be accessed by selecting **Unit Loads** in the sidebar menu. It allows you to search for unit load shipments by Status, ASN Number, Shipment Number, Item Code, Ship From, or Ship To location.

To create a new unit load, click ➕ **Add**. To edit an existing unit load, select the appropriate row, and click ✏️ **Edit**.



Adding or editing a unit load brings up the **Create Unit Load** view.

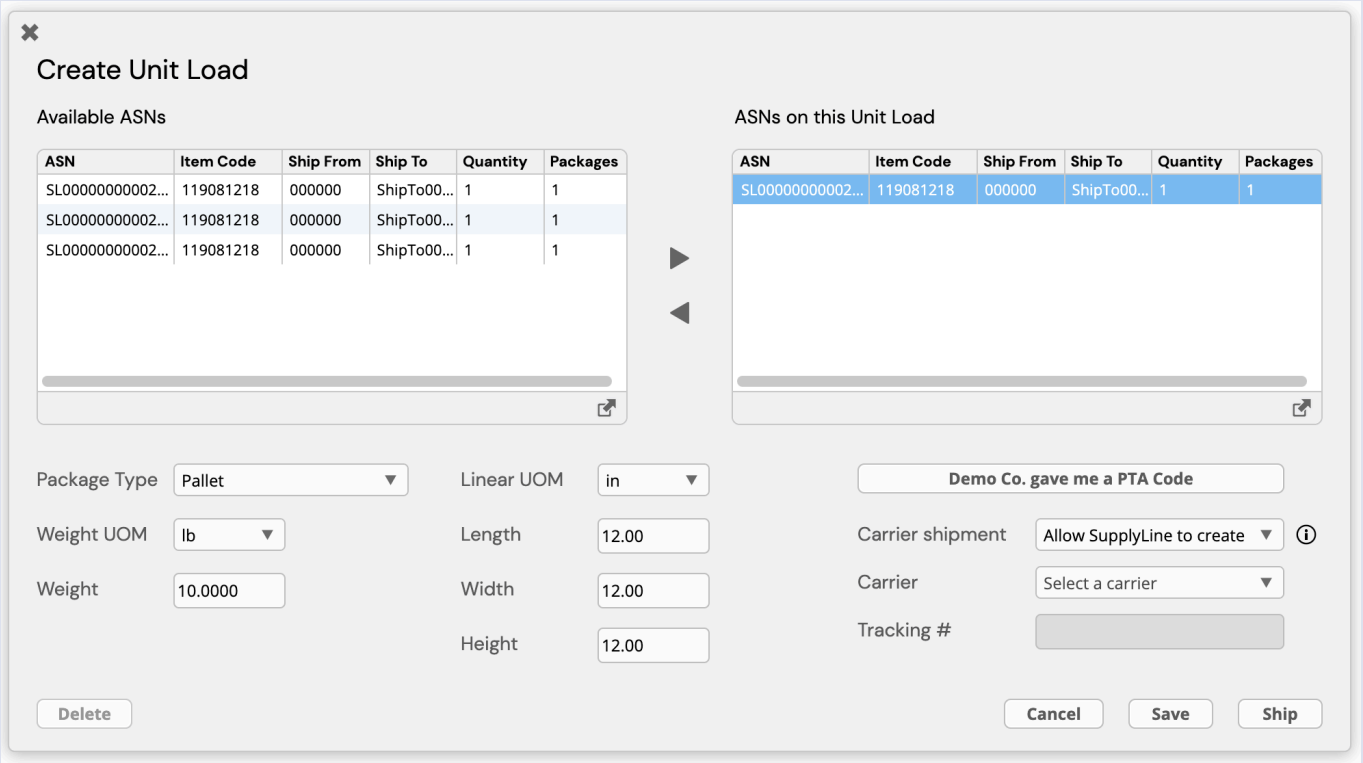
The top portion of this screen shows **Available ASNs** on the left, and **ASNs on this Unit Load** on the right. To move an ASN into or out of the unit load, select the appropriate row and then click the arrow pointing in the appropriate direction. You may also double-click a row to move an ASN.

Once you have added an ASN to the unit load, SupplyLine filters the list of **Available ASNs** so that you will only see ASNs that are being shipped from and to the same locations. A unit load may only include ASNs that are being shipped together to the same dock code or physical address depending on how the SupplyLine instance is configured.

Carrier Shipment Handling Options

When creating or editing a unit load, you must specify how the carrier shipment will be handled. The **Carrier Shipment Method** dropdown provides the following options:

- **Allow SupplyLine to create**: SupplyLine will contact a carrier to create a carrier shipment on behalf of the supplier. The customer pays for the shipment. Carrier shipment labels will be generated if your SupplyLine instance has been configured to do so. The supplier is responsible for scheduling the pickup time with the carrier. When this option is selected, the **PTA Code** field becomes available for entering a pre-assigned pickup authorization code.
- **I have already created**: The supplier has already created the carrier shipment and will provide the details. This is the default option if your SupplyLine instance is not configured to create carrier shipments. When this option is selected, the following fields are required:
  - **Carrier Service**: Select the carrier and service level used for the shipment.
  - **Tracking Number**: Enter the tracking number provided by the carrier.



PTA Code Functionality

When using the **Allow SupplyLine to create** carrier shipment option, you can optionally enter a PTA (Pickup Transportation Authorization) code. The PTA code is a pre-assigned authorization code that can be used to schedule carrier pickups. Click the **Add PTA Code** button to reveal the PTA code input field, then enter the code provided by your organization.

Additional Unit Load Properties

Once you have assigned ASNs and configured the carrier shipment method, you can provide additional properties for the unit load, including the weight and dimensions.

When you have finished editing, click one of the buttons at the bottom of the screen:

- **Delete**: Delete the unit load from the system. The ASNs will then be available to be assigned to another unit load.
- **Cancel**: Discard all changes.
- **Save**: Save the unit load, but do not ship it yet.
- **Ship**: Save the unit load and ship it.

Note: Any user (supplier/customer side) can cancel the unit load before it is shipped. Once a unit load is shipped, only customer users can cancel any ASNs linked to the unit load.

Critical Parts

Parts that are identified as critical appear in the screen that is displayed when you select **Critical Parts** in the sidebar menu. Click a row to see the **Part view**. Use Part Flag Reference filters to refine the list.

Tools

On-Dock Criticals

This report shows critical parts for all linked suppliers that have a quantity waiting on the dock. This view can be exported. Click the icon in the bottom right corner of the table to export the data into an Excel or CSV file.

Aged In-Transit

This view shows all in-transit ASNs for all suppliers. ASNs can be marked as manually received from this view. Select a row and click 🔍 **Magnify** to view the details for the ASN. This view can be exported. Click the icon in the bottom right corner of the table to export the data into an Excel or CSV file.

LOB Report

Select a supplier, item flag, or value class and click **Generate** to create an LOB report in the form of a spreadsheet.

Part Usage Report

Enter one or more part numbers (one part number per line) and click **Generate** to view past order data and future part usage data. This view can be exported. Click the icon in the bottom right corner of the table to export the data into an Excel or CSV file.

Inventory Value Stream

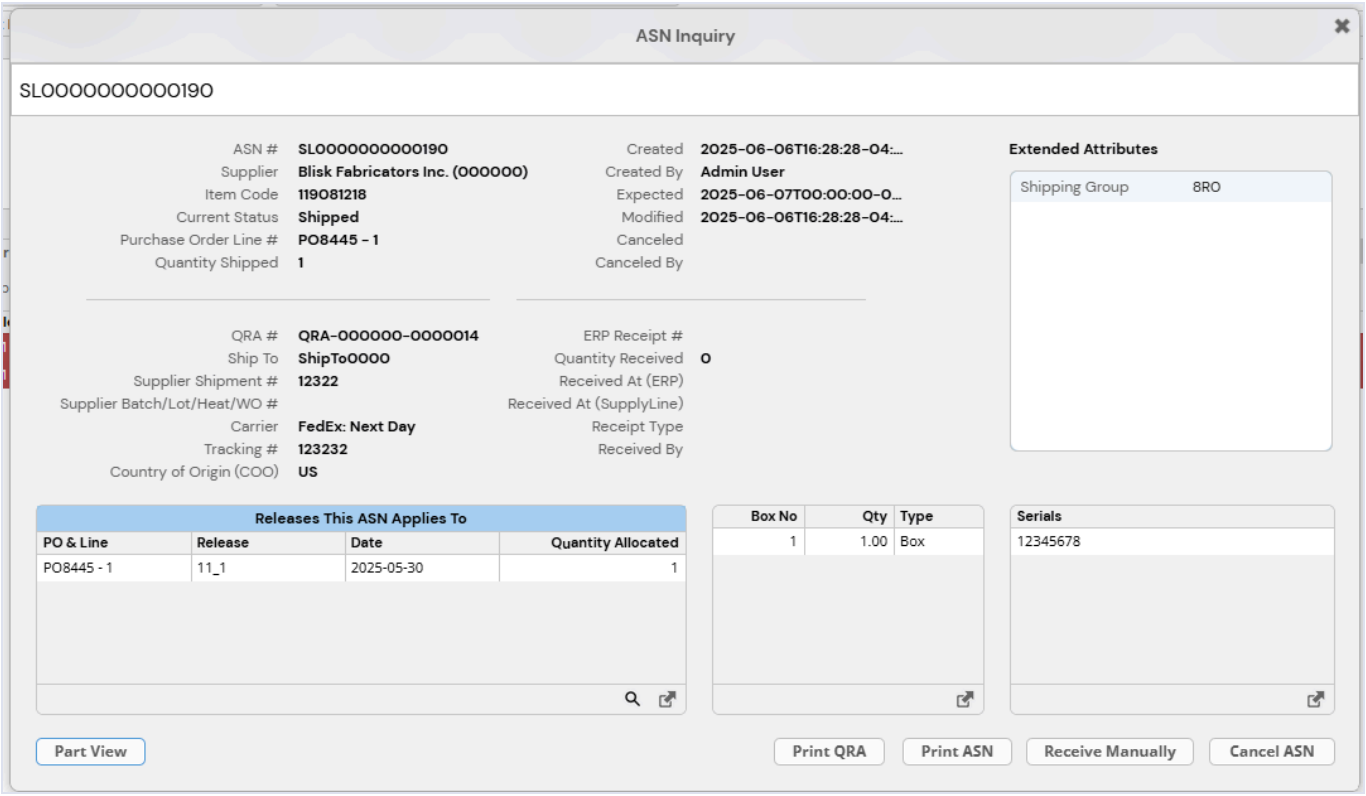
This view displays the value stream (On Hand, In Inspection, In Transit, In Supplier Stock) for all of your linked suppliers' parts. This view can be exported.

ASN Approval

If a part has been marked to require ASN approval, all requests to create ASNs will appear in this view. Select the ASN, and click 👍 **Thumbs up** or 👎 **Thumbs down** to approve or decline the creation of an ASN.

ASN Inquiry

Enter an ASN number and hit the Enter key to view the details of an ASN. ASNs can be canceled or received manually from this screen. All releases that are linked to the ASN will be displayed in the **Releases This ASN Applies To** table. This screen also shows how the ASN is packaged, and the serial numbers of the items on the ASN, if relevant.



Receiving an ASN from Shipment Details

The **Shipment Details** page opens when you click a shipment on the **Shipments** screen. Each ASN on the page that has a **Shipped** status offers a **Receive Manually** action. Click **Receive Manually** to open the **ASN Manual Receiving** dialog, enter the **ERP Receipt Date** and **ERP Receipt Number**, and click **Receive**. The ASN then shows a **Received** status (or the shipment shows **Partially Received** when only some of its ASNs are received), and the **Receipt Information** section displays the recorded receipt.

BOM Discrepancy

Run a Bill of Materials Discrepancy report to determine if there are differences between your lead times and assembly quantities and those of your suppliers.

Metrics

On-Time Delivery

Run the On-Time Delivery metric to view all pieces delivered on-time and delinquent with a given date range. Enter a date range and click **Generate**.

Supplier Delinquency

Select a supplier and a snapshot date from the dropdown menu to display a chart which shows past and future supplier delinquencies. This chart can be downloaded or printed.

Lifter

Viewing Issues in Lifter

Lifter discovers business issues in the data from your ERP.

Select **Lifter** in sidebar menu. When **Lifter** opens, you can choose whether you would like to view items that you handle or items that all users handle. Select **Me** or **All Users** from the dropdown menu.

A list of **Issue Types** is displayed in the left-side panel, along with a count of the number of issues found for each type. Only types that have outstanding issues appear in the list.

Select an **Issue Type** to show all issues that match the type.

All instances of that particular **Issue Type** are listed in **Lifter's** middle panel with a brief description and the date and time the issue was detected. Each issue can be selected for more details and to find out how to resolve the problem.

Resolving an Issue in Lifter

The error message and other relevant issues are displayed in the right-side panel of Lifter. All known resolutions for the issue are provided, along with links to more detailed descriptions of each resolution.

Once you have resolved the issue in your ERP, you should click **Mark as Resolved** in **Lifter**. You are presented with a new window asking which resolution worked for you. Select a resolution, and click **Resolve**.

Note: **Lifter** pays attention to the resolutions that work most often, and it shows them first in the resolutions list.

Search All Parts

To search for an item by item number, select **Search All Parts** sidebar menu.

SupplyLine Extras

Finding Items on a Page

In many areas of the SupplyLine application, it can be helpful to utilize the key combination CTRL + F (CMD + F for Mac users) to search for values in the user interface. This key combination can speed up the process of locating information like an ASN number or item number in a long list.

Exporting Data from Tables

There are several places in SupplyLine that allow you to export a list of data to a Microsoft Excel or Comma-Separated Value (CSV) file. If a table is available to be exported, **Export** appears at the bottom of the table.

For example, from the **Part view** screen, the **Advanced Shipment Notifications (ASNs)** (labeled **Shipments** when the Shipments feature is enabled) and **Schedule** tables can be exported to Excel or to

a CSV file. **Export** appears at the bottom-right corner of each table.

Help

Training Videos

Several SupplyLine training videos are available for all users to view. These videos can be helpful when learning to navigate SupplyLine. To access the training videos:

1. Click

   on the bottom of the sidebar menu.
2. Select **Training Videos**
3. Select a video to view from the list provided

Opening a Support Ticket

To contact Robot Morning's Support Team, all users can open a new Support Ticket. To open a new Support Ticket, follow these steps:

1. Click

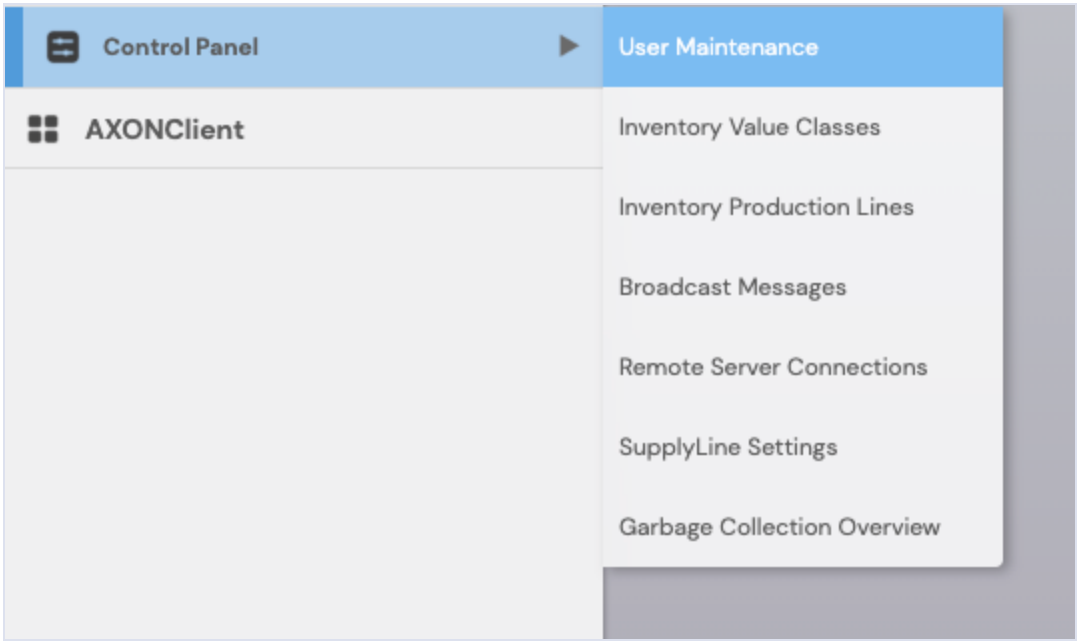
   on the bottom of the sidebar menu.
2. Select **Contact Support** from the menu
3. Follow the instructions in the support message to submit a support ticket

Superusers can modify the text, email address and portal URL. Please refer to RMOS User Documentation for details.

Control Panel and Administrative Functions

Administrator users (Superusers) in SupplyLine have access to everything that Buyer and Supplier users can access.

Superusers and Buyers also have an **Control Panel** button in the sidebar. Several **Control Panel** functions are available under this menu. Buyers only have access to the **Users** menu option.



Users

You can add, remove, and maintain users in SupplyLine. This includes the ability to update email addresses, names, usernames, and passwords. Click **Control Panel** and select **Users** from the menu to access the **User Maintenance** view.

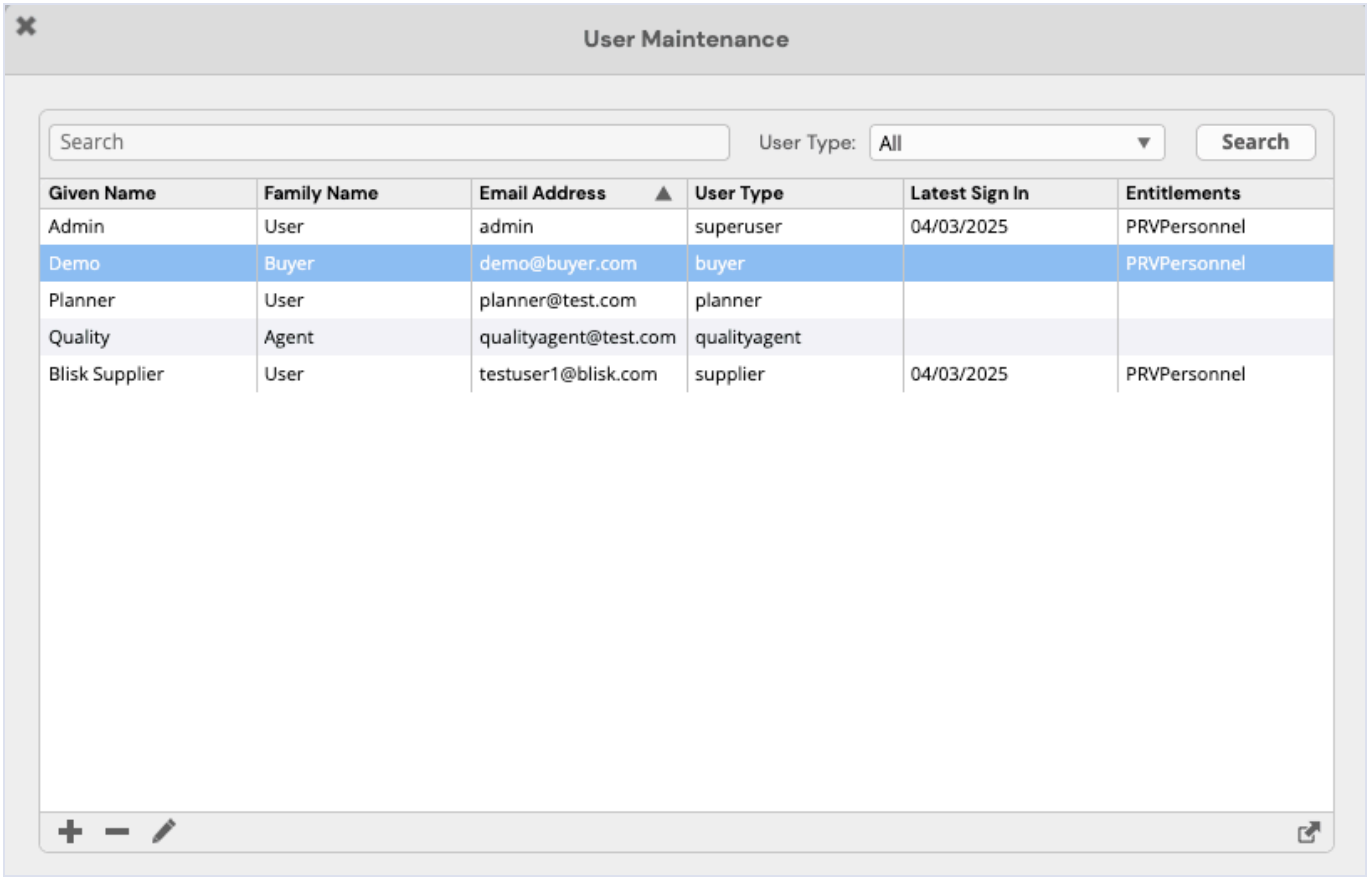
To add a user, click ➕ **Add**.

To remove a user, select the appropriate row, and click ➖ **Delete**.

To edit a user or change a password, select the appropriate row, and click ✏ **Edit**.

Quality Agent users can view general part information and create Quality Release Authorizations (QRAs) for all suppliers. Quality Agent users cannot create Advanced Shipment Notifications for suppliers.

Note: Buyer users only have access to Supplier **User Type**.



User Entitlements

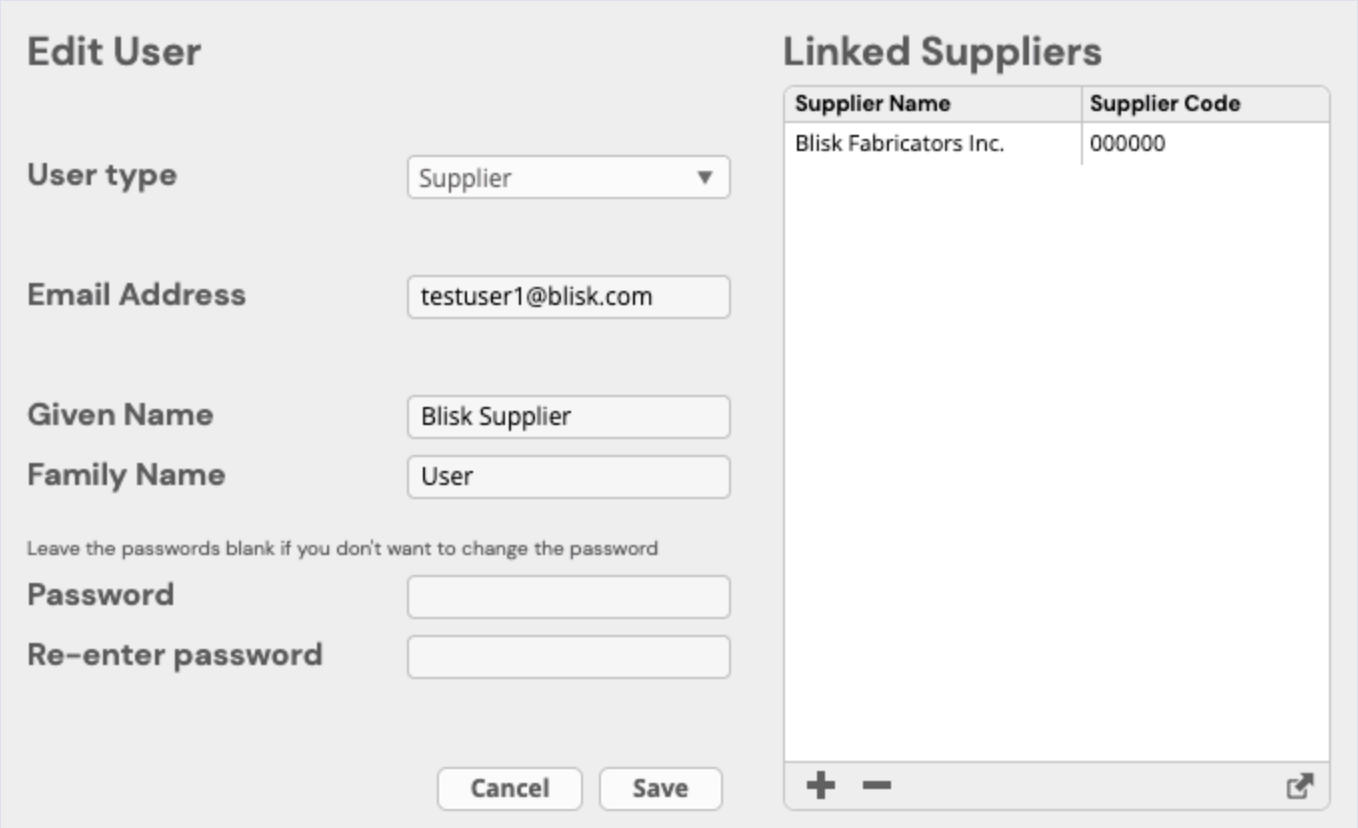
Entitlements restrict certain features in SupplyLine to the users that are associated with those entitlements. Entitlements can be applied to both internal and supplier type users.

The following is a list of entitlements available in SupplyLine:

Entitlement Name	Description
Product Release Verification personnel (PRVPersonnel)	This entitlement provides proper access to features in SupplyLine related to the Product Release Verification personnel role, such as QRA maintenance

Linking Suppliers to Supplier Users

To link suppliers to a Supplier user, add or edit a Supplier user in the **User Maintenance** window.



To add a new link to a Supplier, follow these steps:

1. Click ➕ **Add** in the **Linked Suppliers** table
2. Search for the Supplier by typing in the Supplier's name or code
3. Select the Supplier from the list that appears
4. Click **Save** when you are finished.

To delete a link to a Supplier, follow these steps:

1. Select the appropriate row in the **Linked Suppliers** table
2. Click ➖ **Delete**
3. Click **Save** when you are finished

User Type Feature Matrix

Features Available From the Main Toolbar

Features	Toolbar menu button	Superuser	Buyer	Planner	Supplier	Quality Agent
View part list	Parts	X	X	X	X	X
View/Edit Suppliers	Suppliers	X	X			
View Unprinted ASNs	Unprinted ASNs				X*	
Download schedule (single supplier)	File Exchange	X	X		X	
Download schedule (multiple suppliers)	File Exchange				X	

Features	Toolbar menu button	Superuser	Buyer	Planner	Supplier	Quality Agent
Download operational data template	File Exchange	X	X		X	
Upload operational data template	File Exchange	X	X		X	
View/Edit Users (all users)	Admin	X				
View/Edit Users (supplier users)	Admin	X	X			
View/Edit Inventory Value Classes	Admin	X				
View/Edit Inventory Production Lines	Admin	X				
View/Edit Broadcast Messages	Admin	X				
View/Edit Remote Server Connections	Admin	X				
RMOS View Scheduled Tasks	Admin	X				
RMOS View Transaction History	Admin	X				
RMOS Clients	Admin	X				
RMOS Export Configuration	Admin	X				
RMOS Settings	Admin	X				
AXON Settings	Admin	X				
AXON Maintenance Mode	Admin	X				
View Criticals	Criticals	X	X	X		
View On-Dock Criticals	Tools	X	X			
View Aged In-Transit	Tools	X	X		X	
View LOB Report	Tools	X	X			
View Part Usage Report	Tools	X	X			
View Inventory Value Stream	Tools	X	X			
View ASN Approval	Tools	X*	X*			
View ASN Inquiry	Tools	X	X			
View BOM Discrepancy	Tools	X	X			
View On-Time Delivery	Metrics	X	X	X		
View Supplier Delinquency	Metrics	X	X			
View lifter issues	Lifter	X	X	X		
Resolve lifter issues	Lifter	X	X	X		
View tasks	Tasks	X	X	X	X	
View schedule history	History	X	X		X	
View PO Revisions	PO Revisions	X*	X*		X*	
View Unit Loads	Unit Loads	X*	X*		X*	
View training videos	Help	X	X	X	X	
Create new support ticket	Help	X	X	X	X	
View part search	Search	X	X	X		

* Controlled by system setting

Features Available From the Part View

Features	Location	Superuser	Buyer	Planner	Supplier	Quality Agent
Create ASN	Advanced Shipment Notifications (ASNs)	X*	X*		X*	
View ASN Inquiry	Advanced Shipment Notifications (ASNs)	X	X			
View ASN History	Advanced Shipment Notifications (ASNs)	X	X	X	X	
Manage QRAs	Advanced Shipment Notifications (ASNs)	X	X	X	X	X
View schedule	Schedule	X	X	X	X	X
View supplier plans	Schedule	X	X	X	X	
Edit supplier plans	Schedule	X	X		X	
View Purchasing Release Inquiry Report	Schedule	X	X	X		
View Manufacturing Demand	Schedule	X	X	X		
View Sourcing Rules	Right pane	X	X	X	X	
View Purchase Orders	Right pane	X	X	X	X	
Create Notes	Right pane	X	X		X	
View Notes	Right pane	X	X	X	X	
Create/View Tasks	Right pane	X	X		X	
Set Shippable Override	Gear menu	X	X*			
Block Supplier Edits	Gear menu	X	X			
Require ASN Approval	Gear menu	X	X			
Edit VMI Settings	Gear menu	X	X			

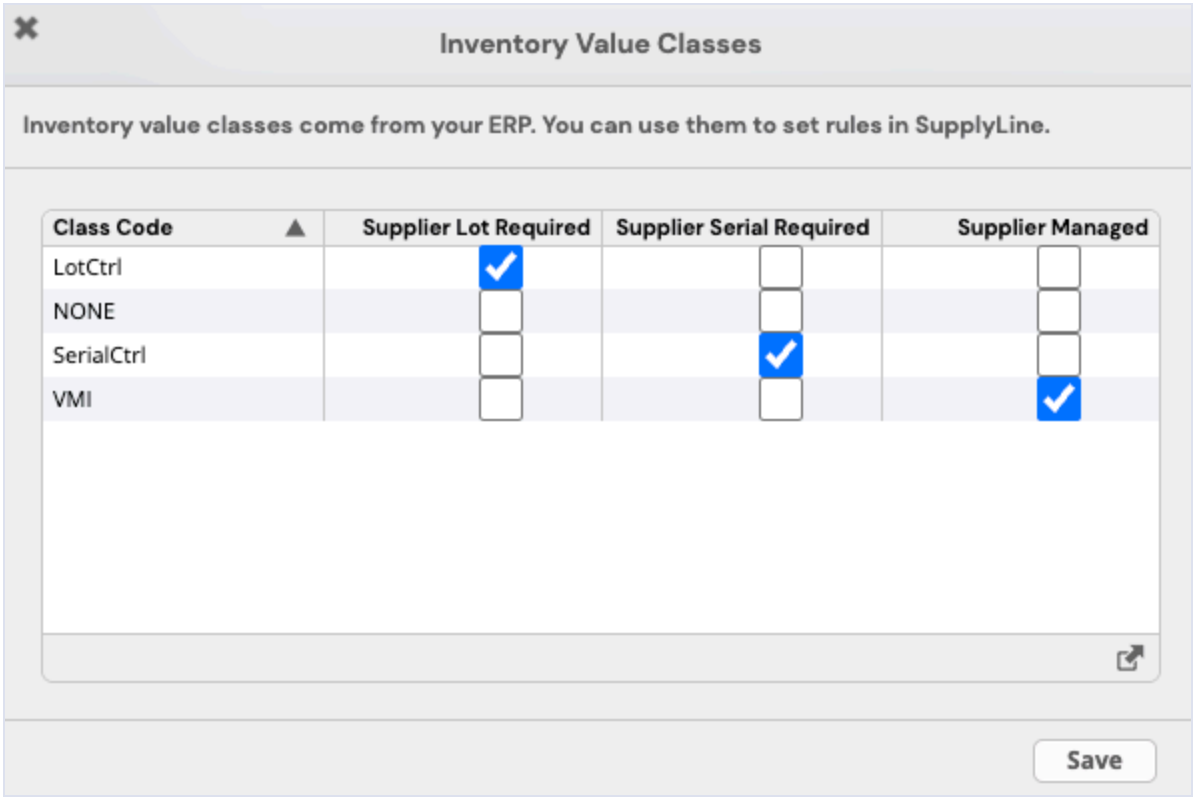
* Controlled by system setting

Inventory Value Classes

You can set rules in SupplyLine using Inventory Value Classes, which come from your ERP.

To access this view, click **Control Panel** in the sidebar menu, and select **Inventory Value Classes** from the menu.

Use the checkboxes to specify if a supplier lot is required, a supplier serial is required, and if the Value Class is supplier managed. Click **Save** if you make changes. When **Supplier serial is required** is checked, serial number entry is enforced on ASNs and QRAs for parts assigned to this Value Class. When unchecked, the serial number field remains available for optional entry but submission is not blocked if left empty.

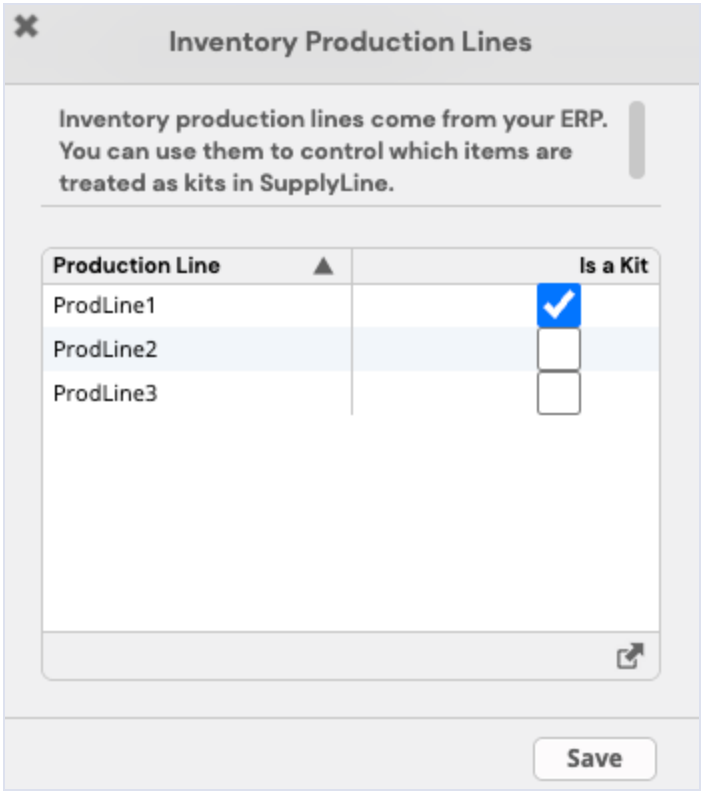


Inventory Production Lines

You can use the Inventory Production Lines view to control which items are treated as kits in SupplyLine. Inventory Production Lines come from your ERP.

To access this view, click **Control Panel** in the sidebar menu, and select **Inventory Production Lines** from the menu.

Use the checkboxes to specify which Production Lines should be treated as kits. Remember to click **Save** if you make changes.



Broadcast Messages

You can post Broadcast Messages for all SupplyLine users. These messages will appear on the landing page when each user logs in.

You can display multiple messages at once, and each will be dated and timestamped. If you are familiar with using it, HTML can be used in Broadcast Messages as well.

To access the **Broadcast Message** view, click **Control Panel** in the sidebar menu and select **Broadcast Messages** from the menu.

To add a new Broadcast Message, click ➕ **Add**.

To remove an existing Broadcast Message, select the appropriate row and click ➖ **Delete**. To edit an existing Broadcast Message, select the appropriate row and edit the text.

Click **Save** after making any changes.



Remote Server Connections

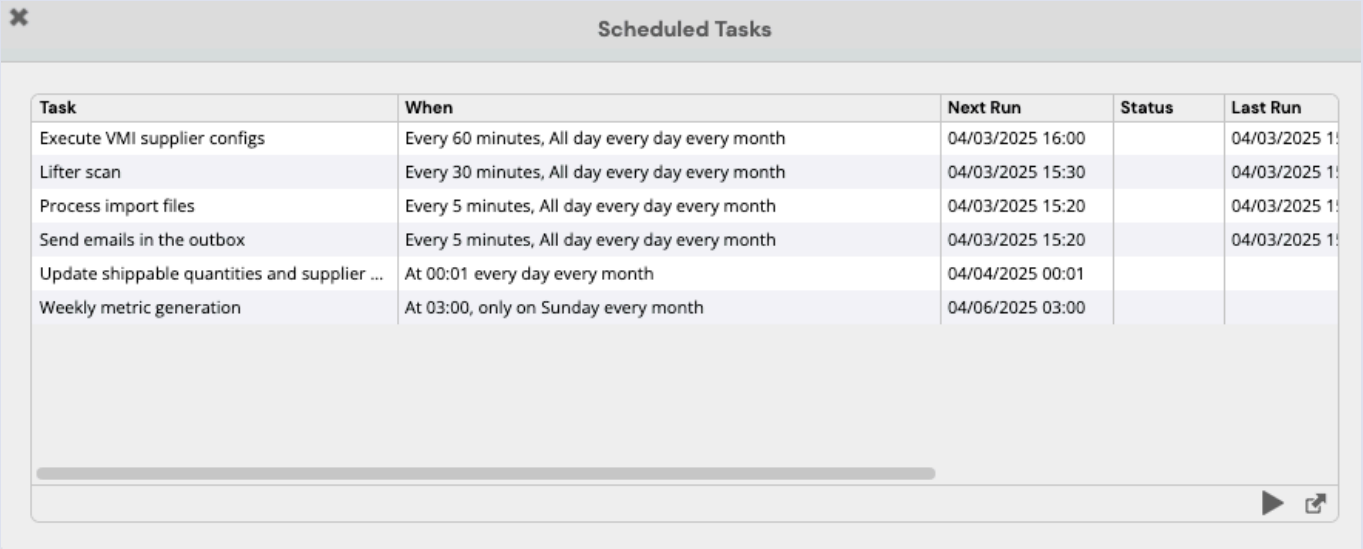
You can configure remote server connections in SupplyLine. To add a new Remote Server Connection, click ➕ **Add**.

To remove an existing Remote Server Connection, select the appropriate row and click ➖ **Delete**.

To access the **Remote Server Connections** view in SupplyLine, click **Control Panel** in the sidebar menu and select **Remote Server Connections** from the menu.

Scheduled Tasks

An RMOS task sets the schedule for when an automated batch of work should start, as well as the options that should be used in completing the work. Each task may generate and run a single or multiple RMOS transactions.



This window allows you to view and manually run RMOS tasks.

An RMOS task has the following properties:

- **Task**: A description of the RMOS task
- **When**: The time interval, or the time of day and the days of the week the task runs
- **Next Run**: The expected date and time RMOS will run the task next
- **Status**: The RMOS task's current status. The following are the possible values:
  - **Complete**: RMOS completed the task successfully
  - **Disabled**: You can't run this task until you enable it.
  - **Error**: RMOS encountered an error when running the task
  - **Running**: RMOS is actively running the task
  - **Transaction(s) created**: RMOS completed the task successfully and asynchronous transaction(s) were created and queued
- **Last Run**: The last date and time RMOS ran the task
- **Last Status**: The status of the last time RMOS ran the task

To manually run an RMOS task, follow these steps:

1. Select a task from the table
2. Click ▶ **Run**

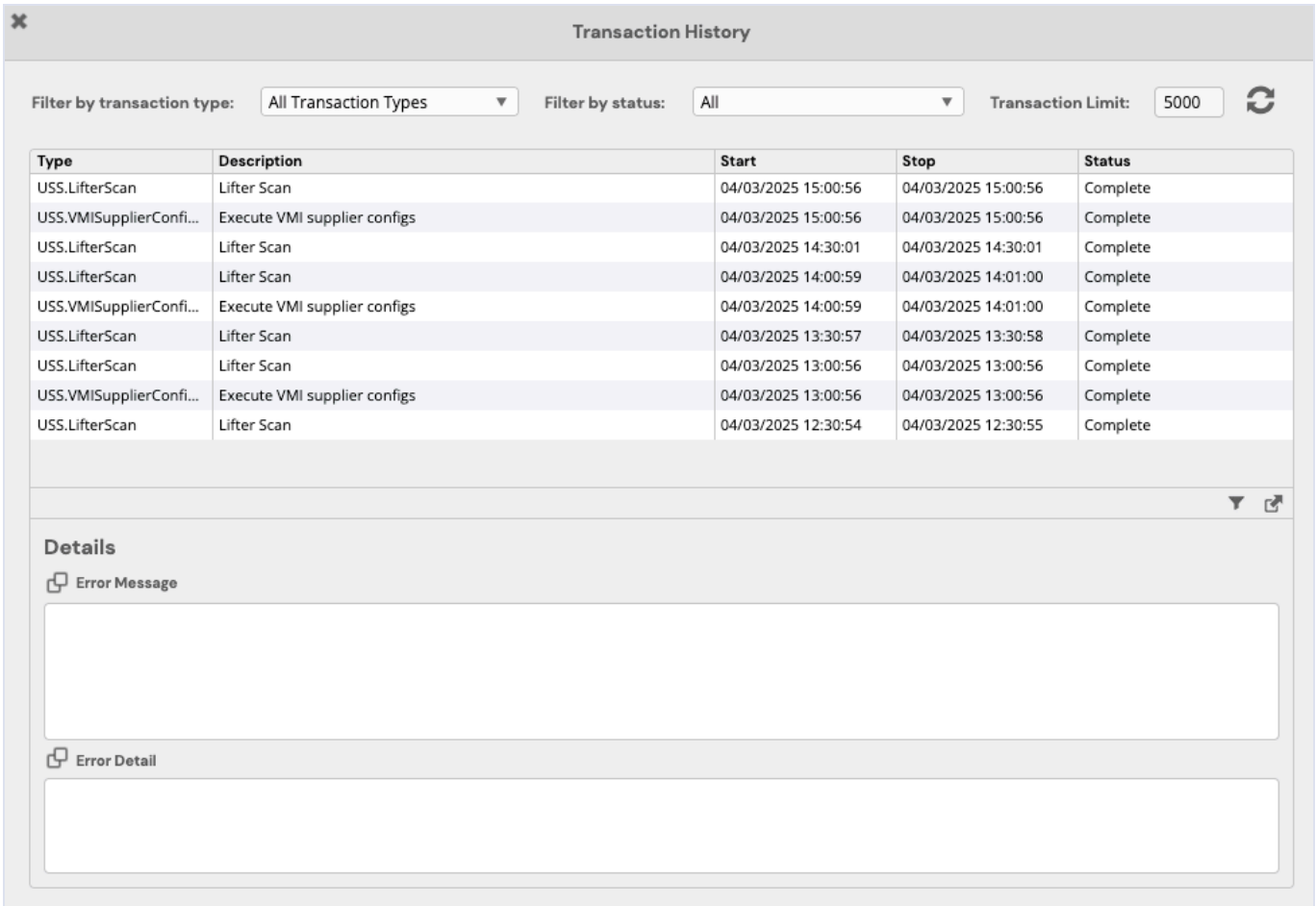
SupplyLine Tasks:

- **Execute VMI supplier configs**: Executes the VMI configuration for suppliers that are configured with a remote server connection
- **Lifter scan**: Detects new Lifter issues and checks existing issues to see if they have been resolved
- **Process import files**: Processed files from the import export file queue (e.g. Schedule, Receipts, Supplier Operational Data - DemandLine)
- **Reconcile stuck shipment notifications**: Detects shipment notifications that are stuck in the "Waiting for Carrier Shipment" status after their parent shipment has been canceled or removed, and returns them to a re-shippable state so the supplier can ship the line again.

- **Update shippable quantities and supplier plans**: Updates the ship date and shippable quantity on schedule releases for the current day, and updates stock supplier plans to current date and clears out stale supplier plans
    - **Note:** Stale supplier plans are cleared out based on N number of days as defined by the value of the **Commit Max Past Due Days** system setting and according to the following rules:
        - Stock supplier plans are considered stale if there were created more than N days in the past
        - Job (WIP and planned) and material purchase order supplier plans are considered stale if they are due more than N days in the past
- **Send emails in the outbox**: Sends the emails that are queued in the email outbox to the configured email server
- **Weekly metric generation**: Generates the weekly metrics for all suppliers viewable in **Metrics > Supplier Delinquency**

Transaction History

Transactions hold information about automated processes that RMOS applications provide; most are initiated by RMOS tasks.



The **Transaction History** window displays the status of RMOS transactions in descending order by when they ran. The **Transaction History** window allows you to filter transactions by type. RMOS transactions have the following properties:

- **Type**: Designates the RMOS application (e.g. SupplyLine), and the transaction type (e.g. ShipmentNotification)
- **Description**: Provides a brief description of the action the transaction took
- **Start**: Timestamp showing when the transaction started
- **Stop**: Timestamp showing when the transaction ended
- **Status** A transaction can have one of the following statuses:
    - **Pending**: The transaction is in the queue and is waiting for RMOS to pick it up for processing
    - **Running**: The transaction is currently running
    - **Complete**: The transaction has successfully completed
    - **Error**: The transaction failed to complete due to an error
        - **Note:** The **Details** section provides you with detailed information regarding errored transactions. Select a transaction from the list to view the error details

To refresh the list of transactions and their statuses, click **Refresh**.

RMOS Settings

The **RMOS Settings** window allows you to edit the settings that are used by RMOS. See the RMOS user documentation for details regarding specific settings.

AXON Settings

The **AXON Settings** window allows you to edit the settings that are used by SupplyLine to connect to AXON. Valid settings are required to create carrier shipments using AXON.

Event Log

Events logged by SupplyLine

Events logged by SupplyLine in the RMOS Event Log:

- **User Created**: This event is logged when a user is created in the SupplyLine Users view.
- **User Edited**: This event is logged when a user is edited in the SupplyLine Users view.
- **User Deleted**: This event is logged when a user is deleted in the SupplyLine Users view.
- **Schedule Downloaded**: This event is logged when a user downloads a schedule file.
- **Operational Data Downloaded**: This event is logged when a user downloads an operational data template.
- **Operational Data Uploaded**: This event is logged when a user uploads an operational data template.
- **Supplier Part Viewed**: This event is logged when a user views a part view for supplier part.
- **ASN Customs Value Blocked**: This event is logged when an international ASN is blocked from being created or shipped because its customs value would be $0.
- **ASN Allocation Repriced**: This event is logged when a late release customs-value update re-prices the not-yet-shipped ASNs allocated to that release.

See the RMOS documentation for more information about the Event Log.

Garbage Collection

SupplyLine has a garbage collection process that runs every hour. This process removes old data from the system to keep the database size manageable. It also reclaims files a supplier uploaded while creating a Quality Release Authorization but never saved, along with the stored file itself once nothing else refers to it.

To access the **Garbage Collection Overview**, click **Control Panel** in the sidebar menu and select **Garbage Collection Overview** from the menu. The **Garbage Collection Overview** view displays the following information:

